DOCUMENT RESUME

ED 175 111 EA 012 017

AUTHOR	Dale, Duane; And Others
TITLE	Beyond Experts: A Guide for Citizen Group Training.
INSTITUTION	Massachusetts Univ., Amherst.; Massachusetts Univ., Amherst. Cooperative Extension Service.
SPONS AGENCY	Kellogg Foundation, Battle Creek, Mich.
PUB DATE	79
NOTE	123p.; For related documents, see EA 012 010-016
AVAILABLE FROM	Citizen Involvement Training Project, 138 Hasbrouck, University of Massachusetts, Amherst, Massachusetts 01003 ($5.00, subject to change, plus postage; quantity discounts)
EDRS PRICE	MF01 Plus Postage. PC Not Available from EDRS.
DESCRIPTORS	Adult Education; *Citizen Participation; Community Resources; Group Unity; *Learning; Needs Assessment; *Organizational Effectiveness; *Team Training; Trainers; *Training Objectives; *Training Techniques

ABSTRACT

This manual is intended to help citizen groups set up their own on-the-job training activities, tailored to their own individual needs, issues, learning styles, and experiences. Specifically, it discusses building the effectiveness of citizen groups through training for citizen involvement. Chapters are written chronologically, from the first step in the training process through the last. Each chapter is then divided into a series of substeps that usually are required to accomplish a step. Topics discussed include outcomes of citizen group training, the adult education theory, guidelines for determining the goals and objectives of a training program, and suggestions for planning a self-development program. All exercises in the manual appear on single pages so they can be duplicated easily. (Author/LD)

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BEYOND EXPERTS

A GUIDE FOR CITIZEN GROUP TRAINING

BY DUANE DALE WITH DAVID MAGNANI AND ROBIN MILLER

CITIZEN INVOLVEMENT TRAINING PROJECT

CITP, a collaborative project of the Division of Continuing Education and the Cooperative Extension Service, University of Massachusetts at Amherst, is funded by a grant from the W. K. Kellogg Foundation.

EA 012 017

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BY DUANE DALE

WITH DAVID MAGNANI AND ROBIN MILLER

OF THE CITIZEN INVOLVEMENT TRAINING PROJECT

Illustrated by Anita Jeffery-Viera

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Library of Congress Cataloging in Publication Data
Dale, Duane D.
Beyond experts: a guide for citizen group training.

ISBN 0-934210-07-1 79-64419

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INTRODUCTION

This manual is for people who want to build the effectiveness of citizen groups. It is for people who might take a very active role in training (facilitating workshops or serving as training coordinators) and for those who would like to draw a group's attention to skill-building activities as a possible way to become more successful. It is for people with little experience as well as those who have worked in this area of adult education for a while. It can serve as a refresher and reference for the community organizers, YMCA, YWCA or YHA staff, Cooperative Extension Service agents, community college instructors, agency personnel with citizen liaison responsibilities, and others who know through experience that their jobs include an opportunity to help develop the skills within a citizen group. But it is written most especially for citizen group leaders and members who are considering for the first time a program of capacity-building within their own organizations.

The idea of citizen involvement training is a new one to many people, and it's important to distinguish it from other sorts of training based on very different principles. The word "training" may bring to mind a lion trainer or a sergeant drilling an army unit—situations where one person is in charge and the "trainee" is in a passive or submissive role.

"On-the-job training" is more like what we have in mind—individuals learning immediately useful skills through hands-on experience. Citizen involvement training is "on-the-job training" for citizen group members. But job training for workers is controlled by those who hired the workers and manage the business; citizen involvement training should involve people in identifying their **own** learning needs and designing the activities which will meet them. Only an active and democratic process of training can really help people to function more powerfully in a democracy.

There are seven other manuals in the CITP series of citizen group training manuals, covering many of the basic skill areas that citizen groups find they need:

- community organizing
- fund raising
- media and public relations
- citizen involvement mechanisms
- federal, state, and local government
- group process
- program planning and evaluation

These seven manuals include background information, planning guides, and also activities designed for group members as a basis for member-led training activities. Each activity can be used "as-is" or adapted to suit the needs, issues, learning styles, and prior experiences of the group.

In order for group training to take place, someone needs to raise the possibility, to make recommendations about what sort of training will be needed; someone needs to direct or coach the group as it goes through training activities. We hope that you, the reader of this manual, will be willing to take on some of these assignments. This manual is designed to help you do just that, whether you plan to use the other CITP manuals or design your own training activities.

Part I builds an image of citizen training and helps you envision the part you might play in it. Part II examines the preparation for citizenship we did (and didn't) get during our school days, then presents the best of adult education theory and practice as a basis for your own planning.

Part III is a step-by-step guide to planning and carrying out training. Chapter 8 might be considered the heart of the book, since it contains a comparison of suggested methods with abundant references to examples in the other seven CITP manuals. But Chapter 8 will be most helpful if you take it in sequence with the other chapters, which cover getting started, assessing needs, setting objectives, locating resources, developing an overall training design, logistics, leadership of training sessions, and evaluation. Part IV focuses on you as trainer, with suggestions for planning a self-development program and finding the support you need to stay with it.

BEYOND EXPERTS...

Our society has an abundance of experts—scientists and technologists, economists and policy analysts, labor relations specialists and military strategists, transportation planners and health system managers. Much has been said about the public's faith in these people—our willingness to leave it to the experts. Yet from time to time we **do** challenge the thinking of the current band of "wise men"; Congressional hearings and investigative journalists frequently take one or another expert to task.

Duane Dale

But next day, whether the public's mood is one of acquiescence or dismay, the experts are back at their jobs with the large corporations, the defense department, the power companies, the international banks and other powerful institutions, recommending and rationalizing the decisions which affect us all. So we see nuclear power plants and incredible new weapons systems, environmental deterioration and corporate foot-dragging on more efficient autos, higher health costs and inadequate housing, simultaneous inflation and high unemployment.

Sometimes we discover that there are other experts with equally impressive reasons for drawing opposite conclusions about nuclear power or defense needs or the feasibility of higher-mileage cars. One suspects that "those who pay the piper name the tune," and that if one expert won't give the desired opinion, it's always possible to hire another who will. Citizens become spectators to an endless struggle of one expert against another.

We envision a situation in which citizens, alone and in groups, are much more active at making their own sense out of the social, political, and economic realities that confront us. This means making sense of the world through information and understanding and also through a more direct and significant role in decision making at all levels—in the town halls, the state houses, the halls of Congress and of the federal agencies, in the workplaces, and the financial, educational, and social institutions that affect our lives. This does not require doing away with experts, but making them much more the servants of the **public** will. They must always separate solid fact from opinion and judgment, and must leave to the citizenry the job of deciding which values shall be fulfilled by public policies and programs.

Duane Dale

In order to move beyond the experts to a new era of democratic control, citizens need more insight, information, and perspective. The skills of organizing and of collective influence and action are also required. At the heart of it, citizens need a sense of self-reliance and self-appreciation—a respect for our own insight, wisdom, values and judgments. (We considered titling this book, "Finding Experts in Mirrors.")

That is why the Citizen Involvement Training Project exists—to help citizens prepare for a much broader and more influential role in public policy decisions. But we want to do that in a way which enhances self-reliance rather than promoting dependence on a new brand of expert, the professional citizen group trainer.

Citizens need insight, information, and perspective.

This is the reason for the title, and the reason for this manual—we hope the ideas and procedures contained here will make it possible for citizen groups to run their own training programs. And we hope that the leaders who initiate training activities in their groups will see fit to share the responsibilities and decisions about training.

Duane Dale

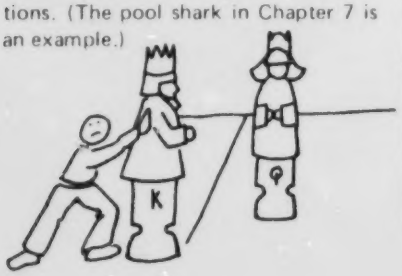
ABOUT THE EXERCISES

There are over a dozen exercises in this manual—activites with step-by-step instructions, designed to lead you through some of the key activities needed to plan training. Several worksheets and checklists also suggest and illustrate the sort of thinking process that can be helpful. Any of these activities can be carried out by one individual, a small group, or the entire membership of an organization. The exercises in Part III expecially will be useful in involving a number of people in a democratic process of developing a training plan. Any of the exercises could also be used by a support group of trainers or training coordinators from various organizations, meeting together to provide ideas and encouragement to each other. (More on support groups in Chapter 14.)

You may want to duplicate the exercises, worksheets, and checklists for group use. You could select the ones that will be most appropriate for your group and compile them into a short workbook. You may also want to adapt the instructions or activities to suit your group's needs. You might also want to develop activities yourself. Let us know what works best for you.

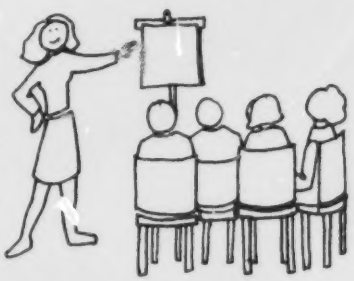
ABOUT THE USE OF HE AND SHE

In a manual promoting open participation and full involvement in the society, it's obviously inappropriate to use "he" when we mean "he or she." Until a more graceful solution evolves, writers must improvise. We chose to use "she" and "he" interchangeably. We tried for a roughly equal split between them, but could not resist the temptation to portray some of our characters in a way contrary to general expectations. (The pool shark in Chapter 7 is an example.)



Keep in mind that the "he's" and "she's" in this manual are of many different races, ethnic and religious backgrounds, ages, income levels, and educational histories. We have been especially aware of those citizens who are disenfranchised, disempowered, and disadvantaged in our present social and economic arrangements. For these people, citizen involvement has often been frustrating and unproductive. Learning the skills of participation **by participating** has generally not worked. We hope that the ideas and methods of this manual will reach these people; we would like this manual to be a step toward the elimination of economic disadvantaged and social injustice.

THE CITIZEN INVOLVEMENT TRAINING PROJECT



The Citizen Involvement Training Project is a program of the Division of Continuing Education, University of Massachusetts at Amherst, and the Cooperative Extension Service. Funded in part by the W.K. Kellogg Foundation, CITP provides training workshops, materials, and consultations to citizen groups throughout Massachusetts. The staff includes specialists in organizing, fund-raising, group process, planning methods, information gathering, social change, and adult education, and offers bilingual training as well.

CITP services include workshops and consultation, a 1000-volume citizen involvement library (available to individuals and citizen groups), staff-generated manuals (such as this), and a "Training of Trainers" workshop series intended to help citizen groups establish their own training components in their communities.

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THANKS...

. . . to the other Citizen Involvement Training Project team members, all of whom have been involved in this manual in one way or another. And a special thanks to the outside people who read and commented on the draft version:

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Ann Holsinger, Cooperative Extension Service, Plymouth, Mass.
Susan Markman, Amherst, Mass.
Connie Petrunenko, Western Mass. Health Planning Council, Greenfield, Mass.
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Beth Walton, Ashland, Mass.

Their comments went a long way toward making this book a practical resource for trainers. Remaining shortcomings are, of course, the responsibility of the authors.

1 WHAT TO EXPECT FROM CITIZEN GROUP TRAINING

Consider the case of the environmental activist who has just moved to a new town. She has quickly discovered that although the new town has less urban smog than her old home, it does have many of the same problems. In the old town an interstate highway connector was being planned which would have cut through a marshy area, a fragile ecosystem that would have been badly disrupted by motor oils, winter road salt, and changed drainage patterns. In the new town, a proposed shopping mall would have many of the same effects. The old town had a chemical plant which gave lip service to Environmental Protection Agency regulations but continued to pour its waste into the river; the new town has a nearby paper mill which does about the same. And, surprisingly or not, both towns are within a county or two of a proposed nuclear power plant site, which our activist considers a threat to health and safety.

So our Jane Q. Public is doing as she did before: joining forces with other concerned citizens by signing up as a member of the local environmental group—in this case, the Newtown Citizens for a Clean Environment. And this is where she has found a big difference.

In her old town, Jane was a leader in a similar group, and it was very effective. For example, the interstate highway had been delayed in order to document the wetland problems and consider alternate routes, thanks to the group's efforts. The Newtown group didn't have any real successes to show, despite five years of meetings.

The difference, in Jane's words, is that the Newtown group just "isn't very sophisticated." Nobody seems to understand who really makes the important decisions that affect the environment; no one knows how to recruit community support through an educational campaign or a petition drive; nobody seems to know how to run a good meeting.

"We may as well go home. It's obvious that this meeting isn't going to settle anything."

Drawing by Booth. © 1976 The New Yorker Magazine, Inc.

A JOB FOR TRAINING

The Newtown group is ripe for training, and it may be up to Jane to point that out. The members may feel they're doing the best they can. Or they may not have ever thought about picking up more skills and insight. After all, when a citizen group fails, there are lots of places outside the group to put the blame:

- "The shopping mall developers have a lot of clout with the zoning board and the town; they're offering jobs and a tax source to the community."
- "The paper mill threatens to move somewhere else if we insist on enforcing the clean water laws."
- "With inflation being what it is, we're just going to have a hard time getting anywhere with environmental concerns."
- etc.

All of these arguments may be true, but it's also true that:

- **A citizen group with a solid mix of skills and insight can do a whole lot better than one that's "unsophisticated."**
- **Almost every citizen group can acquire the capabilities it needs through a program of training.**

After training, the world will **not** suddenly become receptive to all your ideas about a clean environment, or good housing, or what to do to create jobs, or the need for better services. The external problems will still be there—making life difficult for you, making your goals hard to achieve. Training is not a substitute for citizen action and social change, but is instead an essential and integral part of the process of bringing about the changes you want to see.

WHAT TO EXPECT

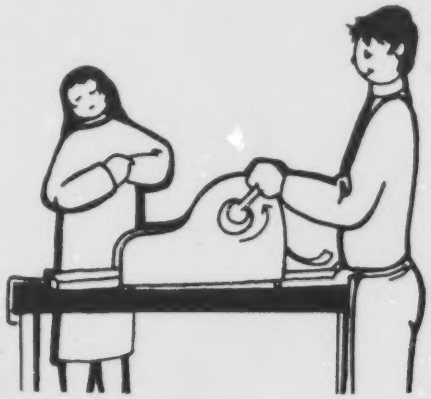
What kind of changes can you reasonably expect training to bring about? What sort of goals would be reasonable to set?

First, don't expect any **instant** successes. Citizen group training is **not** like the body-building programs advertised in comic books: "Two weeks with our method will turn a 98-pound weakling into a solid mass of muscle!"

But second, **do** expect **success**—significant changes in the capabilities and performance of individuals and the group. Every human being has abilities far beyond what we use each day. And every adult has a backlog of experience, skills, and past judgments on which to draw. A carefully designed sequence of learning activities can provide the methods, the information, the direction which can help you release that potential, and the sense of confidence in yourselves and each other to make it work.

There are several broad types of outcome that you can expect from training. Let's look at them one at a time.

Skills–Citizen group training will often have a "how-to-do-it" approach. There are a lot of skills that a citizen group can use: running effective meetings, building membership, designing programs and projects, writing a funding proposal, going to a foundation for an interview, bookkeeping, typing, mimeograph operation, planning a public information/media campaign, writing a press release, carrying out a petition drive, lobbying at the state legislature, developing community support for an idea or strategy, running a conference, and making a movie. Not every group needs all these skills, but most groups have a few areas that could be improved.



There are some skills that every member of a group needs to have, such as the ability to listen and really **hear** another member's point of view. For other skills, it may be sufficient to have a couple of people who really know the ropes. For example, it is not necessary for everyone to be good at writing proposals but it's a good idea for everyone to have a basic understanding of an area as important as fund raising.

Sometimes a citizen group will spot its need for a skill: "What we need is someone who can work with the newspapers, so that they'll start to give us better and fairer coverage." Often, there's an unspoken assumption that the "someone" has to be a new member of the organization; maybe the ace reporter for the Associated Press will just arrive on your doorstep and sign up. The point of a training approach is that the "someone" can be a present member who knows nothing about the media but has the willingness to learn.

Critical consciousness—another name for this outcome might be "analytic abilities." Whatever issue a citizen group is concerned about—whether it's the environment, children's social services, housing, jobs, schools, health care, or something else—real progress only comes when action is based on a solid understanding of what's going on. The citizens need to be able

to identify the principle actors and their positions, spot the reasons why past efforts have failed, and be able to distinguish current symptoms from root causes. And if that means challenging the powers that be by publicizing vested interests or scandals, or raising the possibility that "the system isn't working," then "critical consciousness" means developing the group's confidence and courage to the point of doing that.

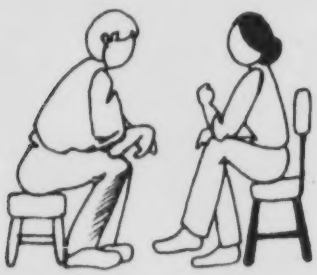
The phrase "critical consciousness" is used in the same spirit as "consciousness raising," which the women's liberation groups made into a household word. The point is to become conscious of the things in contemporary life that "bug" you, to start to understand whether other people have the same problems, and whether those problems indicate a need for social change. "Critical consciousness" comes from the work of a Brazilian educator, Paulo Freire, who taught literacy skills to Indian peasants and in the process helped them discover for themselves the nature of their predicament in society—the reasons they stay poor and underemployed, generation after generation. Before Freire's work, these people had a naive consciousness—no awareness that anything better was possible, and no sense that they had the power to change things. (More on Freire's views in Chapter 4.)

Critical consciousness, then, is the tendency to analyze, to try to understand, through study, discussion and debate. But it also requires the ability to envision something better, and the possibility of bringing about that vision of a better society. Robert Kennedy often said, quoting George Bernard Shaw:

"Some people look on that which is and wonder, why? I prefer to dream of what could be and ask, 'Why not?' "

Problem-solving skills—One of the most widely useful abilities that a group can develop is the ability to identify and solve problems. Some educators believe that the best education is that which focuses on the real problems of an individual or group and encourages participants to explore the facts, identify known solutions, invent new solutions, and choose the best course of action. The learners are motivated by the reality of the problem, and they gain two types of knowledge: information about the particular problem situation and insight about what works to solve problems in general. With confidence in their ability to solve problems creatively and well, a citizens' group can tackle almost anything.

Information—Every group needs technical information about the content of its field. Environmental activists need to know scientific facts (and the principles of ecology), governmental structures, laws (and the way the courts have interpreted them), local environmental problems, and the ways that other groups have chosen to address similar problems. A group concerned about social services for children needs to know principles of child development, governmental structures and laws, local demographic facts and service needs, and names and viewpoints of local service providers.



Self-directed learning—Some educators of children point out that this is a fast-changing world which requires life-long learning, and conclude that the most valuable thing a student can learn is **how to learn**. These educators put the students in charge of their own learning whenever possible through projects, independent study and student-led discussion groups. They also tend to encourage discussion and awareness of "**how** I learned what I learned."

Give me a fish and I eat for a day.
Teach me to fish and I eat for a lifetime.

—Indian Proverb

This is probably not the primary objective of citizen involvement training, but it is an important one. For example, it may be more useful for a group to spend an hour on the information gathering process than on a particular set of facts and figures. If members have skill in pinpointing their information needs, familiarity with reliable sources of information, strategies for getting answers, and confidence in their ability to locate useful facts, they will be able to make their own contributions to the group's information pool on a continuing basis.

It's the same for skills, analytic abilities, and problem solving. Group members can learn how to take charge of their own learning; they can begin to identify learning needs, set goals, create learning opportunities, bring in resource people—whatever they need to do to make the group more powerful. Individuals (especially those with the most advanced skills in self-directed learning) may work on their own to meet needs they've identified as citizen group members; hopefully, they will bring their new skills back and share them with the group.

Attitudes—Many educators give attitude change as a goal of education. There's a problem—attitude change smacks of indoctrination. Can a citizen group rightfully set a goal that all members (or all local citizens) will have a favorable (or unfavorable) attitude toward the current governor or the economic system? What about a bill the group thinks is good? In some cases attitude change may be a legitimate goal; in other cases it may be appropriate to convey information and trust each individual to arrive at a sound judgment. But an educational or training program may target certain attitudes for change which revolve around other learning. For example, the net result of a program of skill building ought to be confidence in the group's ability to act competently and effectively. Time spent on analysis or problem-solving techniques might lead to a favorable attitude toward spending group time using those techniques. Then again, has the training failed if a member thoughtfully concludes that enough time has been spent on analysis, that it's time to take action?

Greater effectiveness—changes in the world—The public school teacher looks for changes in the pupil; the schoolchild may not get much opportunity to use vocational, professional, or citi-

zen skills until years later, when she enters the job market and becomes a voting citizen. But the citizen group trainer can and should expect immediate outcomes out there in the real world. Citizen groups, unless they are strictly social gatherings, exist in order to have some impact on the society, and have goals which reflect that orientation. If training is relevant and successful, then it should begin to show results: members will feel more successful and will be able to point to specific accomplishments and a rate of progress which are significant improvements. It's not only a matter of "We have better meetings" but also "We've come up with a good plan and we're starting to really show some results." Community support secured, the shopping mall blocked or relocated, the water pollution stopped, a successful membership/dues drive held and volunteer time lined up, a demonstration project underway—these are the ultimate successes of citizen training. Without new skills these goals might have been reached more slowly or perhaps not at all; with training, the group can develop the power and the self-confidence to succeed.

Michael Chan

WHAT WILL TRAINING LOOK LIKE?

What sort of activities will help to produce the outcomes just described? Citizen involvement training can take on many different looks; it can vary widely in its content, intensity, duration and number of participants. Here are some examples:

1: A "No Nukes" group, planning a nonviolent occupation of a nuclear power plant construction site, schedules identical one-day workshops at locations spread across seven states. Potential demonstrators are required to attend one of these sessions and to read a 32-page "Occupiers Handbook." The workshops cover theory and practice of nonviolent demonstrations, experience with consensus decision making, practice in dealing quickly and calmly with possible conflicts and crises, and a great deal of factual information. Several thousand people participate in the training sessions.

2: A city YMCA holds an annual weekend retreat for its citizen advisory board and its planning staff. The event combines skill building, information exchange, problem solving, and planning. Usually the retreat has a prearranged focus, such as developing educational and recreational programs for the city's low income people, or trying to resolve a funding crisis. Sometimes the agenda is more open, with opportunities to deal with topics of shared concern. The board and staff members seem to look forward to the sessions, and to enjoy the mixture of learning, planning, and informal team-building.

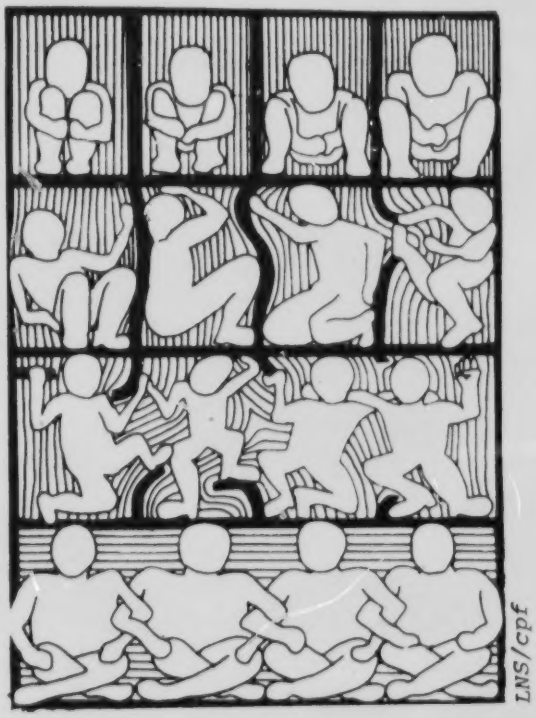
3: The citizen advisory board of a community mental health center decides to spend one hour at each of its spring meetings (two per month) to learn and use a goal-setting and planning process.

4: A group of acquaintances belong to a variety of local citizen groups, most of which are thinking about some sort of fund-raising project. These people decide to spend their next few Saturday mornings together, reviewing a manual on fund raising, and sharing ideas about how their respective groups could proceed.

There are, of course, many other possibilities. This list suggests some of them:

- **training conferences**—most often attended by leaders and active members, usually involving travel to a distant city, sometimes quite costly;
- **courses**—offerings of local community college or high school adult education programs are sometimes relevant;
- **apprenticeships**—sometimes formalized by appointing officers months ahead so they can "shadow" the outgoing officers and learn the ropes from them;
- **skill sharing**—may take place in organized workshops (how to interview for a door-to-door survey, how to run the mimeo machine), as a spin-off of regular procedures (the finance committee's report on its successes and failures at fund raising), or as the result of some well-placed curiosity ("What a good newspaper story about our group—what did you do to get it in there?");
- **fact finding and research**—a special committee may have this function or the whole organization may take it on for a time;
- **individual learning**—an individual member may set about to study the local news, government documents, scientific studies, group planning methods, budgeting and accounting, or some other field that will help the group (this is most helpful in combination with skill sharing or information sharing);
- **resource people**—people with technical knowledge or members of other groups with success stories to tell can be brought in;
- **internships and personnel exchanges**—one or several group members spend a few days or weeks with the national headquarters of their organization, or with another organization like theirs (local or remote) to learn how they do things and bring back skills and information;
- **serendipitous learning**—this is the kind of learning that just happens without being planned. Any time the group does something successfully and well, it's time to look for the serendipitous learning, time for someone to say, "Hey, we've been trying to get the mayor to sit down and talk to us for five years and we finally succeeded. What can we learn from that?"
- **problem solving**—any time the group seriously tackles a problem and tries to solve it, there will be some learning—serendipity, again. If attention is drawn to the **process** by which the problem was tackled, there may be learning in that department.
- **workshops**—time set aside for learning, including role plays, simulation, discussion, problem-solving and other participatory activities, with very little lecture. May be scheduled in advance, or may come up in the midst of a meeting: "Hey, could we spend a little time right now learning how to write a press release, so everybody will know?" Another variation is a community workshop series open to all local citizen groups, and led by group members or outside resource people.

Notice that these training methods don't look very much like formal education. They are not the methods of the average classroom teacher; they are more likely to be used by a corporation's training department, and for good reason: they constitute on-the-job training for citizen group members. Notice also that a lot of them go on already, even within groups which have not put a priority on training. Every group will find that it has at least some of these activities going on; no group is starting from scratch.



TRANSFORMING YOUR GROUP

On the other hand, no group is doing as much as it **could** be on training; probably only a very few are doing **too much**. A group with a real commitment to training will be identifying training needs early (and often), planning effective ways to meet those needs, and providing the resources and encouragement to make it all work.

It all begins with a vision of success—**your** vision of your group functioning more effectively, more powerfully. And not because Ms. Powerhouse moves to town and joins your group, but because the current members commit themselves to learning what they need to know, and acquiring the skills they need to have, in order to really move forward.

Discussion Questions:

- *What skills would make it possible for you to be more effective in your work with your citizen organization?*
- *As a group, what skills are you lacking that someone else in the group should develop?*
- *What abilities do you have (perhaps as a result of your experience with this group) that you could share with (teach) other members of the group?*
- *What were some times in the recent history of this organization when you felt that we were bogged down—times when you felt frustrated, bored, annoyed, or when you thought that we weren't making adequate progress?*
- *In each case that you've identified, what was the cause of the problem?*
- *Can you identify skills or abilities that the group doesn't now have, but which would have helped the group deal with the problem situations?*

Jackie Hayden

2 YOU CAN MAKE THE DIFFERENCE

You are an educator already.

That isn't news to those readers who are paid adult educators, or to anyone who has as a job description "citizen group trainer." Take a moment, though, to consider the ways that the rest of us already serve as educators, before we lay down the gauntlet and challenge you to be the person who makes the difference for your group, the one who starts the group down the road toward training and greater effectiveness.

You are an educator: a diagnoser of learning needs, a planner of learning projects, a designer of learning environments and activities, an evaluator of progress. Your prize pupil is **you**. You've thought about what you need to study to pass an exam, or to succeed in your line of work. You may also have decided you wanted to learn to repair your automobile, to speak Spanish so you can talk with your neighbors, or learn about tenants rights so you can deal with your landlady more effectively. Actually, you tackled your toughest learning assignment before you even started school—learning your native language! Granted, you had some help and encouragement along the way, but you really had to figure out for yourself what all those big people were saying and how to use their words to get what you wanted. As is often the case, you ultimately had to learn it for yourself.

More recently, you've planned for the learning of others. Perhaps you bought a play pen for a youngster, and some toys which invite that person to work at the development of coordination and perception skills. You created a learning environment that kept the child safe while providing the tools for self-directed learning.

Perhaps you told some friends how you went about planning your last vacation—serving as a resource person for a learning activity which they initiated. You undoubtedly have personal examples which are especially important to you. The following exercise invites you to examine one of them and to appreciate the role you played in it.

Exercise: YOU AS EDUCATOR

number of people: one to many
minimum time: 10 minutes
materials: paper and pencil

If you're doing this activity by yourself, jot down your answers for later review or discussion. If you're in a group, you can answer the questions individually (on paper) and then discuss them, or answer them orally in small discussion groups (2-7 people).

Process:

1. Recall a time when you helped someone learn something. Remember as many details as you can; write them down or describe them aloud.
2. Answer these questions about the incident:

   - What sort of help did you provide (planning, locating resources, providing information, etc.)?
   - What did you do that was most helpful to the learner?
   - Is there anything you could have done differently that might have been more helpful?

Michael Chan

Let's return to the idea that you are your own prize pupil. There's a consequence of that fact which bears pointing out: you are the world's leading authority on **how you learn best**. Different people learn best in different ways, and the same person may have different ways to learn different things. The next exercise will help you pull together what you know about your own learning style. If you are able to get a group of people to do the exercise with you, it will become very apparent that there are different "best methods" for each of them. If the other people are members of the citizen group which may want training, then the responses should be kept for reference later, when it's time to select training methods.

Different people learn best in different ways, and the same person may have different 'best' ways to learn different things.

Exercise: HOW DO I LEARN?

number of people: one to many
minimum time: 10 minutes
materials: pencils, copies of form below

This exercise asks you to identify your preferred learning technique for different types of learning. First, however, it asks you to think about which types of learning activity you use most frequently. This allows you to compare your present choices of learning techniques with those you think would be best.

Process:

1. There are twelve learning techniques listed below. Read through the list and add any other techniques that come to mind. Then put a number "1" beside the one you do most (measured in hours per week), in column A. Put a "2" next to your second most common technique, and a "3" next to the third. (Optional: continue to number the techniques from 4 to 11.) Put a 12 next to the technique you use least.

2. Columns B, C, D and E are for you to identify the technique you would prefer to use for each of the four major types of learning (fact, skill, etc.). Put one checkmark in each column to indicate which of the 12 techniques you would prefer to use for that type of learning.

3. In column F, indicate with a check the technique which you prefer overall.

Learning Technique	(A) Do most (rank)	Preferred learning technique for . . .				
		(B) a fact	(C) a skill	(D) a process	(E) a new idea or perspective	(F) overall preference
1. Listening to a lecture						
2. Reading (newspapers, books, magazines, etc.)						
3. Writing (letters, reports, diaries, essays, etc.)						
4. Discussion with peers						
5. Discussion with experts						
6. Do problem-solving activity alone						
7. Do problem-solving activity with others						
8. Simulation/role playing						
9. Apprenticeship/emulation of others						
10. Sit and think						
11. Think/act/reflect						
12. Other:						

Discussion Questions:

- *Are there differences between the methods you prefer and those you actually use most?*
- *Is there a reason for these differences?*
- *What would you need to do in order to start using your preferred methods more?*
- *What could you do to assure that training activities planned for your citizen group are in line with the preferred methods of group members?*
- *What could you do to allow for the fact that different people learn best using different methods?*

Compare your overall preferences (Column F) with those of CITP workshop participants; see the table on page 28

The learning activities you've participated in undoubtedly generated a variety of feelings: pride in success, frustration at being stuck, fear or anger at being put on the spot, disappointment at not getting your questions answered, delight over rapid progress. As an educator (remember, we're all educators), you've probably experienced many of these same feelings; perhaps you've also felt the anxiety of anticipating a bunch of tough questioners, or the supreme satisfaction of seeing someone whose learning you've assisted go on to use that learning in a significant project.

The residue of feelings from past learning can influence your thinking about future learning or about becoming a trainer. If, in balance, your experience has been positive, you're more likely to proceed and succeed. If there were certain parts of your experience that left a bad taste, then similar situations may be hard to get enthused about next time around. And if you're someone who just didn't like school, then it's especially important to think about what's different now, or how to make it different and better. The next exercise is designed to help you think about those feelings.

Exercise: HOW I FEEL ABOUT LEARNING AND HELPING OTHERS LEARN

number of people: one to many
minimum time: 15 minutes
materials: copy of question list below

Process:

1. Jot down answers to the eight items which follow.
2. If in a group, find two or three other people to talk with.
3. Optional: review your response to the eight items.
4. Answer the discussion questions.

A reminder—we're defining education and learning broadly; don't limit yourself to experiences that occurred in a classroom or other **formal** educational setting.

1) A time when I felt very proud and satisfied with my learning . . .

2) A time when I felt frightened in a classroom or workshop . . .

3) A time when I was angry about a learning experience . . .

4) A time when I was disappointed or frustrated . . .

5) A time when I enjoyed learning very much . . .

6) A time when I was in the educator role and felt very uncomfortable about it . . .

7) A time when I was the educator and felt very pleased and satisfied . . .

8) Other times when learning (or educating) brought up feelings (and identify what the feelings were) . . .

Discussion Questions:

- *Overall, how did you feel about your formal schooling? What did you especially like about it? dislike about it?*
- *Thinking in terms of all your learning experiences (in and out of school), what can you say about the situations that led to positive feelings?*
- *What have you done in the past to create learning experiences for yourself that led to those positive feelings? What could you do in the future?*
- *Are there some common elements to the situations which were satisfying to you as an educator? What could you do to create more situations like those?*

HOW TO MAKE A DIFFERENCE

If you've followed the exercises so far, you've thought about your history as an educator, drawn some conclusions about how you learn best, and explored your feelings toward learning and helping others learn. Now it's time to focus on your citizen group, to consider the question, "What will it take to make a difference, to get my group moving on that path to more skills, better insights, and greater effectiveness?" The ideas that follow are directed especially to the insiders—the group members (or leaders) who are thinking about training for their own groups. Some ideas for the outsiders come later.

There are several activities that need to be carried out in order to implement a successful training program. One person could do all of them, or different people could do each, or a small team could share them.

1) There needs to be someone who will "call the question"—someone who will bring the possibility of training to the group's attention. This can be done in various ways, the best way depending on the situation and the group: talk with members individually, or stand up at a meeting, or get the support of officers and outspoken members, or pinpoint things that could be done better (whose toes are you stepping on?), or sketch a verbal picture of the group with all the skills it needs, or get other members to read this manual, etc. More on the options in Chapter 5. For now, the point is that someone needs to get things started.

2) There needs to be someone to coordinate training. This is the person who would have special responsibility for thinking about the group's training needs and ways to meet them. The job could include planning of training activities—or making sure that the group as a whole or a planning committee gets together and does the planning. The job would probably involve getting the group to set aside times for training, locating resource people, overseeing the training budget (if there is one!) and seeing whether the training accomplished what the group was after. The job could, but would not have to, include leading the training activities or serving as a resource person or expert. It could instead involve locating such people as they were needed.

We believe that virtually every citizen board, council, issue-organization, and action group would benefit by designating a trainer coordinator, someone who would carry out the functions just described.

3) There needs to be someone who would lead training activities, either scheduled workshops or spontaneous discussions of "what we've learned" that come up in a meeting. This doesn't need to be the same person every time; it doesn't have to be an insider. It does need to be someone who understands the learning goals of the group, is comfortable in a position of leadership but is willing to share control with others, is a good listener and can help to draw people out, and someone who can instill confidence in the group's ability to learn and to succeed.

4) There may need to be people who can demonstrate procedures or provide specialized information. These resource people may be group members, representatives from other citizen groups, local lawyers, politicians, scientists, or people with "process" expertise in areas like problem solving or the fund raising process. Sometimes a separate resource person won't be needed; the same person may be able to play both parts, or a facilitator may be sufficient in a topic where the group is its own best expert.

If you're an outsider rather than a citizen group member, it has probably become apparent to you that there are some of these tasks you could take on and others that you couldn't. For example, if you're a staff person with a social service agency who's assigned to work with a citizen board, you may be very eager to see the group develop its capabilities. But you probably aren't the one to present the idea to the whole group, though you might raise the possibility with a few key people and see if they will bring it up. If the idea for training comes from an outsider, it can often be seen as "his thing" rather than the group's commitment.

As an outsider, you may be an appropriate choice as facilitator or as a resource person in an area that you have expertise. The group might want you to take the job of training coordinator; sometimes things are structured that way by the agency. The danger is that the training may start to seem like a lot of other learning we've been through, with a teacher who chooses the curriculum and the learners as passive recipients of knowlege. If you're an outsider in the role of training coordinator, you have to work very hard to keep the group in charge of the learning process.

It's almost time to decide who should perform the four training functions for your group—initiator, coordinator, facilitator and resource person. But first, we'd like you to take a look at the resources you would bring to these jobs. Keep in mind that you have a lifetime of experience behind you, as a learner, a planner of your own learning, and as an occasional (or frequent) creator of learning experiences for others. So give yourself the credit you deserve. Then think about the ways that the group could back you up.

(Did I hear someone say that they're much too busy to think about taking on these jobs? That you want to use the exercise as a way to rate other candidates from within your group? Well, if you're not willing to do it, ask yourself whether there really is anyone more qualified. Before you start looking around, give a good long thought to what part you can play. After all, when you try to recruit someone else for the job, she's sure to ask "What about you?" Often, the best place to find the expert you need is in a mirror.)

Exercise: ASSESSING YOUR STRENGTHS

number of people: one to many
minimum time: 20 minutes for each person in the discussion group (see step 1 below)
materials: paper and pencil

Process:

1. If in a group setting, form discussion groups of three or four people. Each person will be in the spotlight for 15 to 20 minutes. One other person should take notes on what the "spotlight person" says (for her own future reference).

2. The "spotlight person" should answer the five groups of questions. If the others want to make suggestions, they should wait until the speaker has had her say about an item.

3. If the discussion group is made up of members of the same group, they could individually answer the first two items and discuss items 3, 4, and 5 together as a group.

The Questions:

1) What are the assets (strengths) you could bring to the jobs described above—initiator of training, training coordinator, facilitator, resource person. Consider each role separately if you like. Keep in mind your past experience, your personality, your style of relating to people, your role and influence in the group.

2) What help would you need from other group members in order to carry out each role?

3) What resources does the group have which would help to carry out training? (example: a budget that could be used to pay facilitators or resource people, lots of talent within the group—ripe for skill sharing, a commitment to training, etc.)

4) Who do you think would be your strongest allies for training within the group? What sort of support might you get from them?

5) Based on your answers to these questions, what action do you need to take?

This activity would ideally be done in a support group with trainers from other citizen organizations. It could also be done alone or with a committee made up of those members of one citizen group who are concerned about its training needs.

THE MOMENT TO DECIDE

This is the moment you've been waiting for: your opportunity to make a personal commitment to promote training within your group. You **can** make a difference, but not without summoning up your full determination. Training takes time—regular attention over months and even years. But the strength of your personal commitment can inspire others in the group to want to take the time required.

The wording of your commitment is up to you. You might be willing to say, "I will do everything in my power to see that my group has the best possible training program." Or you might say, "I will become the group's training coordinator, and I will give it whatever is required of me." Or you might only be willing to say, "I will raise the possibility of training and get the group to make a decision about it." Make the strongest commitment you feel comfortable with. The important thing is for you to actually take pen in hand and write down a commitment. (After that, do whatever you need to do to uphold it: announce it to your spouse, frame it and hang it over your dresser, whatever.)

This is silly, you say? They actually want me to write down what I plan to do? I'll just read the book, thank you.

Well, all right. Read the book, but we **do** really mean it: we want you to come back to this page and sign on the dotted line. Too many books get read and then sit on the shelf. It would be better if you read no farther but made a commitment instead. The time has come; you don't even need paper, just write in the book:

I, _____ (being of sound mind and body), do commit myself this ___ th day of _____, 19___, to take the following action to implement a training program in

_____
(citizen group)

Good, thank you very much! (Your group will thank you someday, too.) Now, in case you're feeling a little shaky, remember that this manual is intended to help you carry out that commitment. Here's what's coming up: in chapter 3, an analysis of what went wrong in our public education and why we don't have all the action skills we need already; in chapter 4, a look at some positive models and good ideas from educational theory and practice. Chapters 5 through 13 present a step-by-step model for systematically planning and carrying out a single learning activity or an entire training program. Part IV contains specific ideas to help you develop your insight and your competence as a key person in your group's development.

Good luck!

3 WHAT WENT WRONG?

If you're going to take a lead role in promoting citizen action training within your citizen group, you'll need some idea of where you're starting from—what people know and what they don't know. It may be that your group members are better informed and more capable than the average citizen, but you need to know that the overall picture is not good.

Recent studies indicate that a lot of basic knowledge which might seem essential for citizenship is not being learned (see box, next page).

One of the major jobs that public education is supposed to perform in a democracy is to prepare people for their role as citizens. So critics of various persuasions look at the research findings and suggest a variety of underlying causes:

- It's hard to teach citizenship to young people who don't vote, don't work, and aren't very interested in the issues.
- It's hard to teach anything when there's such a discipline problem in our schools. If teachers would only run a tighter ship . . .
- The schools may preach about democracy, but they're run as a hierarchy, with no appreciation for the self-control that students could exert over their own learning. There's a "hidden curriculum"—maybe not so hidden—of preparation for acceptance of one's station in structures of hierarchical authority.
- Most schools take a "banking" approach to education: ideas are like coins and the students are like a piggy bank. The teacher's job is to cram as many ideas in, as fast as possible. This promotes passivity, not inquisitive thinking or the ability to challenge old ways of doing things.
- The schools do their best to avoid controversy; they have to try to please everybody because everybody pays the bill. Teaching citizen **action** skills is bound to be controversial; teaching facts and history is not. So the schools are prone to stick to the facts, and to those few vague values which everyone agrees on, like patriotism and the flag.
- Citizen action is bound to challenge the status quo. These days, the schools are really controlled by the large scale corporations, like Xerox, IBM, and ITT, which monopolize the school textbook industry.

STUDIES SHOW GAPS IN CITIZENSHIP SKILLS AND INFO

Since 1969, an organization called the National Assessment of Educational Progress has been testing a cross section of young Americans to find out how well the schools are doing. The social studies results are discouraging.

- Less than half of 17-year-olds and 26-to 35-year-olds understood how to use all parts of a simple ballot.[1]
- Only 60% of 26- to 35-year-olds understood that presidential candidates are nominated at national conventions.[2]
- Only 35% of the 17-year-olds understood a map and accompanying table.[1]
- Only half the 17-year-olds and young adults understood the meaning of the term monopoly.[1]

In 1974, the Opinion Research Center and the University of Texas at Austin conducted a study of adult "functional competency" and found a startling amount of "functional illiteracy"—the inability to perform basic tasks which seem essential if one is to cope effectively with modern life. A national sample of 1,500 adults was asked to respond to 67 problems based on real-life situations. Here are some results from the "Government and Law" section:

- When asked to write a letter to a Congressperson, recommending a vote against a particular bill, 10% failed to adequately identify the bill and 20% did not instruct the legislator to vote against the bill.
- When asked to read a portion of a pamphlet on rights when arrested and indicate which part of the pamphlet is most appropriate for a hypothetical situation, almost 60% gave an incorrect response.
- When asked about the right to peaceful assembly (guaranteed by the first amendment), 12% would deny this right to "certain kinds of groups" ("radicals" or "troublemakers").
- When asked whether police have the right to hold an individual for up to a week without bringing charges, 34% incorrectly said yes.[3]

1 Simon S. Johnson, **Update on Education**, National Assessment of Educational Progress, 1975, pp. 125-126.
2 "Citizenship Education," **Intellect**, March 1974, p. 344.
3 N. Northcutt, **Adult Functional Competency in Texas**, University of Texas at Austin, 1975.

Those companies **are** the status quo, and they aren't going to do very much to stir up challenges to the present way of doing things.

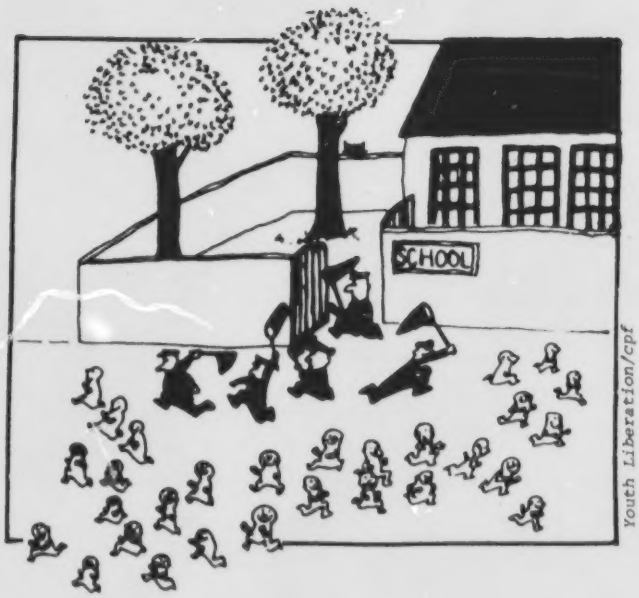
- For whatever reasons, there are many citizen action **skills** which the schools don't even **try** to teach. It's a rare school that teaches such practical skills as:
  - how to organize a petition drive,
  - how to critique a local budget,
  - how to organize to influence public policy,
  - how to plan effective programs or successful change strategies,
  - how to resolve conflicts,
  - how to raise money for special programs and projects,
  - how to get your message across to the broader public,
  - how to analyze the causes of social problems and develop ideas for addressing those problems.

The list of criticisms could go on. The question for concerned parents and students is, "What can we do about it?" Even if **your** immediate concern is with the training of your citizen group, you may want to invest some time in making public eudcation more effective as a training ground for citizen activists. You'll need your own interpretation of the problem, some ideas for improvement, and a lot of allies. (Your citizen group is a good place to look for them.)

Discussion Questions:

- *What do you think is the reason that today's young people and adults are lacking in citizenship skills and knowledge?*
- *Which of the interpretations presented above do you agree with?*
- *How does your local public school do at preparing young people to be active in citizen groups?*
- *What sort of activities or curriculum improvements would you recommend? What sort of resource people or materials would be helpful?*
- *What could you do to get things changed within your school system?*

Duane Dale



WHAT ABOUT ADULT EDUCATION?

So what about adult education? Is it a means for preparing people for a successful role as active citizen group members? Consider first the formal adult education programs which go on at high schools, community college, universities, perhaps churches and elsewhere.

Studies have shown that over one-fifth of the adult population participates in organized adult education in any given year. However, less than one percent participate in courses on public affairs, current events, or civic issues. This percentage has been relatively stable over a decade, as measured by three separate studies.[4]

Less than one percent participate in courses on public affairs...

Public affairs courses do not attract a representative sampling of the overall population. They seem to appeal especially to men, to middle-aged people, and particularly to college educated people.[5] They are not very successful at reaching minorities and low income people who probably need them most. And since the predominant methods of organized adult education are those of the high school—lectures, talks, and classes—it may be that they have the same problems as public school education: a focus on information rather than skills and "banking" rather than action.

REALITY AS THE CLASSROOM

Whether an individual adult participates in adult education activities, she is inevitably enrolled in a "course" on public affairs, civic issues, and current events. The daily newspaper is the text, Walter Cronkite is the lecturer, and the newsmakers provide the content. Even for those who avoid the mass media, direct experiences—of prosperity, inflation, war, or joblessness—drive home their own lessons. Family members, friends and co-workers set up discussion situations and pose questions.

If there's any doubt about whether that "classroom" teaches lessons which stick, ask anyone who lived through the Great Depression to tell what they learned from it. (And find one person born since the depression who hasn't heard personal accounts of it from parents or other acquaintances!)

Different people learn different lessons or draw different conclusions—but that's true of any educational system. People learn different things depending on the sources they choose—and again it may be that better-educated people choose more sources and maybe better ones. There may be biases: perhaps the **New York Times** doesn't print "all the news that's fit to print," or all the viewpoints, for that matter. But there's a bias which concerns us more than these: the TV-watching, newspaper-reading citizen will acquire a lot more facts than skills, a lot more information about reality than ideas on how to shape it. The mass media don't very often teach citizen **action** skills.

Thomas Jefferson believed that the way people would learn to participate in democratic self-government was by doing it—by participating in debates, by joining committees, by working for causes. We agree with him; we think that's the **best** way to learn it.

People who are trying to get involved, trying to be influential, are motivated to learn how to do it better. They're in the business of solving the real and practical problems that come up as one tries to be effective. There's no need to concoct artificial situations or learning activities because the real ones are immediately at hand.

4 Johnstone & Rivera, **Volunteers for Learning**, 1965, p. 50; Kay, **Adult Education in Community Organizations, 1972**, 1974, p. 12; Carp and others, "Adult Learning Interests and Experiences," in Cross **et al.** (eds.), **Planning Non-Traditional Programs**, 1975, p.24.

5 Johnstone & Rivera, 1965, pp. 73-80.

The rest of this manual is about this type of learning. And it really is a "school of hard knocks" approach to things—you learn by making some mistakes, heeding or ignoring advice, working together with people who share your concerns. The orientation of this manual is not how to turn this 'school' into an orderly classroom, but rather how to assist with the learning which needs to go on.

DISCRIMINATION AT THE SCHOOL OF HARD KNOCKS

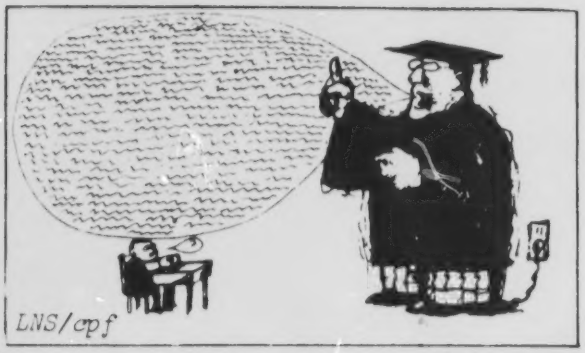
But before we go further, we'd like to point out a difficult and perplexing problem: those who get involved learn how to do better; those who don't try don't learn much at all. Those who sign up and get active in citizen groups learn how to be more effective (especially if they have good helpers and trainers); those who stay at home have relatively **less** power to the extent that the activists learn from their experience and get more effective.

"So all well and good," you say, "the ones who go out and get involved earn their successes. If the silent majority didn't like what was going on, they could do something about it too. The squeaky wheel is the one that deserves the grease."

But what about this: the people most prone to get involved in citizen groups are the ones who are relatively advantaged already, in terms of education and other status measures. Several studies concur that . . .

- College educated persons are much more likely to get involved politically than less educated people.
- Men are somewhat more likely to participate than women.
- Whites are more likely to participate than blacks and minority people.
- Professional people are more likely to be involved than non-professionals.
- Labor union members are more likely to take an interest in politics than nonunion laborers.
- People who are economically well off are more likely to become involved than low income people.
- Married people are somewhat more likely to participate than single people.
- People in their 40s and 50s are more likely to be involved than people in other age groups.
- City dwellers are more likely to be involved than rural people (although small cities seem to have higher rates of involvement than large ones).6

6 L.W. Milbrath, **Political Participation**, 1965, pp. 120-138; J.L. Woodward and E. Roper, "Political Activities of Amercian Citizens, **American Political Science Review, 44** (1950), p. 873; G.H. Gallup, **The Gallup Poll, 1935-1971**, 1972, p. 2186.



The point is this: **People who need help to be more powerful won't get it if we work only with present participants in citizen groups.** There's a vicious cycle that operates: if you don't think you can be very effective, you stay home rather than doing as Tom Jefferson hoped you would—joining in and learning from your experience. Most people never "apply" to the "School of Hard Knocks" (by signing up for a citizen group), perhaps for fear that their language isn't refined enough or their thoughts aren't sophisticated enough to seem important or to get heard. Some disadvantaged people have tried and dropped out, often because their problems require such basic social changes that success is infrequent.

Most people who get involved are advantaged already, in terms of education, income level, etc.

What does this mean for the trainer? Perhaps that a new round of recruitment needs to accompany the beginning of a serious training program within a group. But the goal isn't to fill some quota of low income blacks in an organization that has been all white; it's probably more useful to the low income blacks to have their own organization. The trainer needs to think about whether she is working only with the group(s) she feels most comfortable with, and what to do to help build skills in the group which need them most.

Discussion Questions:

- *Is there discrimination in your local "school of hard knocks"?*
- *What needs to be done?*
- *What can you do about it?*

4 EDUCATION FOR ACTION

Don Freeman/Da Capo

The previous chapter contained a lot of bad news for the would-be citizen group trainer—public education and adult education aren't doing well at preparing people to be active citizens. What does this mean for you as a citizen group trainer? Are there no guiding principles for preparing people to tackle community issues and take action to improve things?

Fortunately, there is some good news—some guidance from the research and experience of adult educators—which is very helpful to the citizen group trainer. In this chapter we present nine of the most helpful and inspiring insights we have run across which can help to create a program of education for action.

1 "TAKING ACTION" IS THE MOST COMMON REASON FOR LEARNING

Allen Tough, who does research on adult education, reported in 1969 that the main reason for adults to begin a learning project (or continue one that they've begun) is to use what they learn in taking action. Tough asked people to name a learning project which they had undertaken recently. He offered a list of 13 possible reasons for beginning a learning project; overall, the one rated highest was "use for taking action."[1]

Other studies have offered different possible reasons and gotten different answers. For example, Johnstone and Rivera's 1965 report on adult education identified reasons for taking adult education courses. Over one third of course participants checked each of these as reasons:

- Become a better informed person
- Prepare for a new job or occupation[2]

"Carrying out everyday tasks and duties" at home and away from home were also identified as reasons. A practical orientation to adult learning is very common, and Tough's option, "use for taking action," captured the common thread of practicality which runs through much of adult learning, whether the potential use is at work, at home, or in the community.

Conclusion: Citizen group trainers who offer practical, action-oriented training will be in tune with the approach that many adults have to learning.

2 ADULTS ARE LEARNING EVERY DAY

Educators are fond of proclaiming the need for "lifelong learning" which would help people keep up with a changing world and changing job opportunities. The fact is that adults are learning continually whether they sign up for adult education courses or not.

Reasons for Beginning a Learning Project

1. Use for taking action
2. Puzzlement, curiosity
3. Pleasure from the activity of learning
4. Enjoyment from receiving the content
5. Satisfaction from possession of knowledge or skill
6. Use in order to impart to another
7. Use in order to understand something
8. Enjoyment from practicing the skill
9. Someone noticing the learning efforts
10. Feeling of learning successfully
11. Unconnected benefits, such as social contact
12. Completing unfinished learning project
13. Use in an examination

Tough, 1969, p. 10, Table 2.

1 Allen Tough, **Why Adults Learn**, Ontario Institute for Studies in Education, 1968, (ERIC Document ED 025 688), p. 10.
2 Johnstone and Rivera, **Volunteers for Learning**, 1965, p. 143.

Again, Allen Tough provides the most interesting evidence. His book, **The Adult's Learning Projects**, reports on intensive interviews with 66 adults representing various occupations.[3] The average participant could identify eight learning projects which consumed about 700 hours during the previous year! Only one person of the 66 could not recall any learning projects.

This 98% "participation rate" with an average of two hours per day spent on learning was totally out of line with previous studies. Johnstone and Rivera, for example, found a 22% participation rate in courses and self-study. The main reason for the difference was Tough's broad definition of a learning project: over seven hours of activity with the primary purpose of pursuing a specified area of knowledge or skill. Most of the projects would have been missed in a study of formal learning. If someone had read child-rearing books or gone to classes in baby care, that counted. If they had purposefully chosen to read all the newspaper and magazine coverage on the Middle East crisis, that would count. A self-directed reading program on photography or Chinese cooking or astrology would also count. (Participation in a citizen group would probably not count, even though a great deal of learning might result, because the definition required that the primary motivation for an activity must be the learning; serendipitous learning was excluded from the definition. However, training sessions held by a citizen group would count.)

Tough's professors and politicians were the most active learners, but in every occupational category there were people who had averaged over two hours per day at learning. The conclusion is clear—adults are continually learning, and they are capable of setting their own direction for learning and of planning their own learning activities.

3 Blue-collar factory workers, women and men at the lower end of the white-collar scale, beginning elementary school teachers, municipal politicians, social science professors, and upper-middleclass women with preschool children.

3 ANDRAGOGY IS DIFFERENT FROM PEDAGOGY

Translation: Adults don't necessarily learn best by the methods designed for children. Adults have more experience to draw on and incorporate into their learning, more ability to take responsibility for their own learning, and more specific and immediate purposes for their learning. They may also have a backlog of bad feelings about the learning experiences of their childhood, a need to avoid the "bad vibes" which they experience when seated at student desks or listening to a 50-minute lecture.

andra- = man, adult
peda- = child
-gogy = theory or practice of teaching or learning.

The term "andragogy" was coined by adult educators who wanted to stress the idea that adult learning need not and should not pattern itself after the practices used in the education of children. Because adults have wide personal experience to draw on, they are important resources to each other in any group learning process; the teacher (if any) is less likely to have a corner on wisdom in adult learning, and must learn to share center stage. Also, adults have a need to integrate new insights into old knowledge—they look for ideas which help to make sense out of their prior experience.

Adults are more able than children to take charge of their own learning and to plan their own learning process. Because of this, the leader of an adult learning activity can often be more useful as a consultant in this planning process and a helper/facilitator when it is implemented, rather than as the sole planner, lecturer, and evaluator.

Adults have specific purposes for their learning, often in the form of problems to be solved or tasks they would like to perform better. This may result in less tolerance for knowledge packaged in abstract and hypothetical terms, and more interest in dealing with their own real cases, learning very clearly how to apply principles and insights to those cases.

So leaders of adult learning should not be bound or even guided by their memories of learning methods from school days. Because there is a wide variation in adult experience, content and methods need to be tailored to the learners.

Having said that andragogy is different from pedagogy, we're going to contradict it: andragogy and pedagogy both need to move in the same direction. And they seem to be. Some of the major reform efforts in public school education, such as the open classroom and individualized instruction, are built on the idea that **children** have a lot of past experience to draw on as they continue to learn, the ability to be responsible for their own learning, and the opportunity to apply what they learn in immediate real-life situations. Adult educators can learn a lot from these reform efforts.

4 DIFFERENT PEOPLE LEARN IN DIFFERENT WAYS

"Different strokes for different folks" is definitely the rule in learning, and even for an individual there are different methods which are better for different types of learning. You wouldn't think this was true, to look at the typical public school or college classroom. The more common rule of thumb is "get everybody to do the same thing at the same time." It's cheaper that way—less planning and supervision is required—and it's easier to maintain order and discipline.

But every individual has ways that he or she learns best—and if you care to ask, you can find out what they are. CITP did ask the people who attended a series of workshops, using the "How Do I Learn;" exercise in Chapter 2.

Preferred Learning Methods of participants in CITP's "Training of Trainer" workshops*

Methods preferred for overall learning (column F)	Votes
1. Discussion with peers (no. 4)	55
2. Do problem solving with others (no. 7)	40
3. Reading (no. 2)	34
4. Discussion with experts (no. 5)	33
5. Think/Act/Reflect (no. 11)	32
6. Do problem solving alone (no. 6)	27
7. Writing (no. 3)	21
8. Apprenticeship/emulation (no. 9)	16
9. Simulation/role playing (no. 8)	10
10. Listening to a lecture (no. 1)	9
11. Sit and think (no. 10)	4
12. Other (no. 12)	4

*Each participant cast three votes

This presents quite a challenge if the trainer attempts to meet everyone's preferences all the time. But it suggests several helpful strategies:

- Identify your group members' learning preferences. See if there are widely held preferences (for reading, for action-learning, for discussion, etc.)
- Involve the learners in planning their own learning. They will intuitively suggest methods which are compatible with their personal learning styles.
- Encourage individual learning projects whenever appropriate; again, learners will be in control of the method and can choose those which are effective for them.

5 SOCRATES WAS RIGHT

Dialogue is an important and effective means of adult education. Learning in which the teacher talks all the time is not as effective as learning in which the participants join in an active process of stating ideas, expressing opinions and exploring possible solutions to problems.

One modern educator who stresses the importance of dialogue is Paulo Freire. A Brazilian, Freire had powerful successes in literacy training with Indian villagers using dialogue as his primary tool. Like Socrates, Freire assumed that there is an important role in a dialogue for someone (a teacher or leader) with a more sophisticated understanding of the realities and problems of these peasants than they had themselves. But Socrates seemed to want to maintain his position of power and authority as the teacher, whereas Freire was always eager to reduce the distinction, to develop the learners' sense of power in the world, and to encourage them to trust their own perceptions and judgments.

Freire focused the dialogues by helping the participants identify their "generative themes"—the issues which concerned them and really "grabbed them." In Freire's eyes the most important themes have to do with the way people make their livelihood (occupations, tools, technology), the ways they communicate with each other (language, culture) and the ways that relationships of power and dominance are maintained or challenged. However, he believes that the generative themes need to be identified afresh for every culture and even for every group within a culture.

Dover Kunstbuchlin

6 THE ESSENCE OF LEARNING IS PROBLEM SOLVING

A lot of educators believe that problem solving is a very effective method for learning. Some are convinced that it is the very essence of learning.

Here is a basic five-step problem solving sequence—a sequence which each of us goes through many times in a typical day:

Step 1:
Awareness of the Problem
We experience a tension, a conflict, a gap between ideal and real—some situation which motivates us to try to change things.

Step 2:
Analysis and Imagination
We attempt to identify and isolate the problem, recall reasons for similar problems, and imagine possible solutions.

Step 3:
Evaluation of Possible Solutions
Rather than begin a trial-and-error testing of solutions, we use past experience and logic to evaluate the possibilities. The prospect of resolving the problem motivates us to take the next step.

Step 4:
Action
We test the most likely and desirable solution by putting it into action.

Step 5:
Reflection
We assess the results obtained by Step 4, identifying the successful and unsuccessful elements of the process. Knowledge is stored which can provide the basis for future problem-identification and problem-solving.

This five-step model is based on the writing of John Dewey, an educator who believed strongly in the role of this sort of process in learning. There are many other models of the steps in problem solving; most are compatible with this one, although they might have a different number of steps as a result of separating problem analysis, review of existing solutions, and development of creative new solutions, for example. A nine-step model of problem solving can be found in CITP's manual, **Planning, for a Change**, page 16; it is based on the book **Universal Traveler** by Don Koberg and Jim Bagnall.

An example may help to illuminate the five-step model:

1) AWARENESS: You walk into a room and turn on the light switch, but the light doesn't go on. A tension is created between what you expected (and desired) to happen, and what actually happened.

2) ANALYSIS AND IMAGINATION: "Hey, there's no light! What happened? Is there a power failure? Did the bulb burn out? Did the fuse blow?"

3) EVALUATION: "Hmm . . . The power isn't out, because the lights are on in the next room. Last time it was the fuse, but then the stereo wouldn't be on—I found out it's on the same circuit. It must be the bulb. That's definitely the thing to try first."

4) ACTION: "Hmm . . . I hope this chair I'm standing on is sturdier than it looks. I unscrew the old bulb, screw in the new one. OK, the critical moment: I throw the switch and . . . it works! Problem solved."

5) REFLECTION: "Well, I was right. And pretty efficient at thinking through the possibilities and choosing the right solution without a lot of trial-and-error. I'm glad I spent some time when the fuse blew to learn a little about which things were on that circuit."

Various educators will tell you that specific parts of the problem-solving process are the essence of learning. Some will equate action and reflection with learning (step 4 and step 5 in our process). Some will stress familiarity with possible solutions to problems (for example, "alternative energy" sources for home heating) as the central aspect of learning (part of step 2). Some will stress recall and logical reasoning (predominant in Step 3).

Many classroom learning situations will focus on one of these aspects of problem solving to the exclusion of others. We suspect that the complete five-step process is the way learning occurs spontaneously, and that educators would do well to build on it. It's important to start at step one, with a motivation on the learner's part to solve the problem. It's important for learners to participate in reviewing possible solutions and inventing new ones if possible. And so on to the fifth step—it's especially important to look back at what was learned, so as to be prepared to deal with similar problems even more efficiently in the future.

There's another benefit from step five: if the learners will look at the problem-solving process itself, they can become more skillful in its use and deal more efficiently with problems which are, at first glance, very different from the one they have solved. They will not only learn new facts, but will also learn how to learn.

7 DON'T WRITE LECTURES, CREATE SETTINGS!

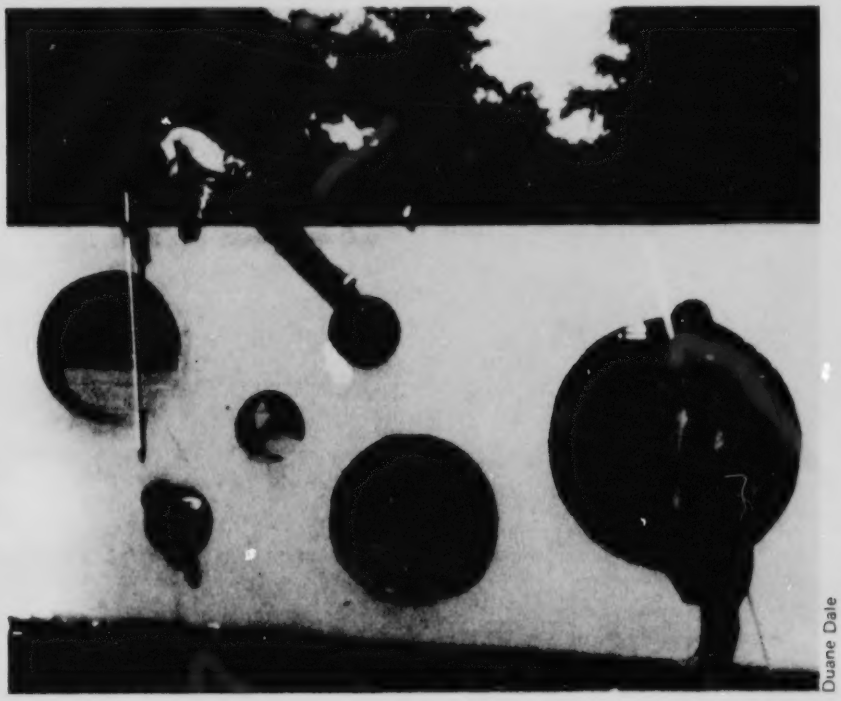
If you are interested in dialogue or problem solving as methods for learning, then you may start to wonder about the role of the educator or trainer. You may conclude, as we have, that it doesn't make sense to prepare lectures—or certainly not long ones.

Traditionally, the educator is the learning experience, or a large part of it. But instead, the educator can **create** learning experiences—activities, settings, or environments that promote learning. The typical workshop is a series of **activities** in which the participants are as much the source of knowledge and learning as the educator. But consider the following case in which the educator created an **environment** for learning and was able to sit back and watch, or provide assistance when needed:

> A college classroom was converted into a learning environment for a two-week course. (The title, appropriately enough, was "Instructional Systems and Programmed Instruction.") Sixteen learning stations covered the major topics of the course. Each station had readings, graphs, and other visual material mounted on poster board in the style of a museum exhibit. Some had programmed learning materials; others had audio-tape materials. Each station had a table and chair. Four empty stations and a library corner provided space for self-directed study; a group of lounge chairs provided a setting for discussions with the instructor or other students.
>
> The room was available eight hours a day; students could pick the time when they preferred to learn. They were free to wander among the learning stations and select topics in any sequence they chose. The instructor distributed a list of possible learning objectives which the environment could meet but left it to the students to choose or set their own objectives. A group meeting was held once a day and the instructor was almost always available for questions or suggestions.
>
> Learners were impressed with the approach. Most were teachers; about three-fourths said they intended to build learning stations in their own classrooms.[4]

A museum-like learning environment may not be what your citizen group needs, but consider the possibility of learning packets (rather than learning stations), which would contain the most useful materials on a topic packaged into a self-instructional kit, with a cumulative log of ideas from all the people who have used the packet before.

It might be that the physical environment for learning concerns you less than the psychological setting—the tone, or climate, or expectations which you can create. A setting for effective problem solving might be one in which there is a high level of energy and enthusiasm, a climate that promotes individual initiative, and an expectation of success. There's a lot that a training coordinator can do to create this type of setting; see Chapter 12.



Duane Dale

4 Horn, "Experiment in Programmed Learning," Runkel and others (eds.), **The Changing College Classroom**, 1969, pp. 68-87.

8 THE EDUCATOR AS FACILITATOR

Active learning, in which the participants are making choices, solving problems, holding discussions, and taking responsibility for their own learning, leaves little room for the traditional teacher role—standing in front of the room delivering hour-long lectures. To the extent that role plays, discussions, media presentations, or other activities take care of the content of the learning experience, the traditional teacher is out of a job.

But this doesn't mean that there's no role for the educator or trainer. There's plenty to do, and the best label we know for the job is "facilitator."

Learners can benefit considerably from someone who stays attuned to the learning **process**—someone who can raise the right question, suggest additional activities, correct misunderstandings, encourage inquiry, and help identify learning which has occurred. This type of leader benefits from a solid knowledge of the content, but is primarily concerned with the processes by which people learn.

The facilitator is a bit like the architect, designing a structure for others to build and use. He's even more like the midwife, assisting at a process in which others are the principle actors, even though he may be more familiar with the process and its variations than they are. Like a midwife, he has some routine duties but is mainly responsible for monitoring progress and providing special assistance if it is needed.

Many tasks which the traditional teacher performs alone—such as setting objectives, selecting activities and evaluating their success—are usually shared by the facilitator and the learners. Learning becomes a partnership, with as much control left to the learners as they can handle.

9 IF YOU'RE NOT PART OF THE SOLUTION, YOU'RE PART OF THE PROBLEM

As facilitators or as traditional teachers, educators inevitably shape the society. A teacher or trainer makes a difference in the lives of the learners—in their knowledge, skills and judgment, their ability to cope with new situations, their clarity about their values and preferences, their sense of how to work for that which they believe is right.

It's impossible for a citizen group trainer to be neutral. You may be prone to shy away from controversy, but unless someone raises the hard issues for discussion, your group might never face the challenges it needs to accept. You may be primarily concerned about internal problems like poor communications or personality conflicts; if you deal with those to the exclusion of progress on the group's goals in the outside world, you may be undermining its success. You may be tempted to postpone a decision about whether your group needs training in order to succeed; "not to decide is to decide"—without your commitment to training, the group might not achieve its full potential.

It's a challenge but also an opportunity to be a citizen group trainer. We see it as an opportunity to build a more democratic society, and to work toward a world which provides a more just and fulfilling life for all.

Discussion Questions:

- *Which of the nine ideas in this chapter are most helpful to you? the newest?*
- *Are there other ideas or insights which have helped to shape your thinking about adult education and citizen group training?*
- *Based on what you have read here, are there any changes you plan to make in your approach to citizen group training?*

Learning is not a separate activity which precedes action; learning is the process of self-aware action.

PART III: COORDINATING A CITIZEN GROUP'S TRAINING

In the first four chapters of this manual, we have invited you to take on the role of training coordinator for your citizen group. We have encouraged you to review your ideas about how adults learn as a basis for planning effective learning activities.

Part III takes a more practical, brass-tacks approach to training. We have identified the main steps that you or others will need to take to plan and carry out a training program. Each chapter in Part III explores one of these steps presenting background information, step-by-step instruction or planning guides, examples of how other trainers have approached that step, issues that may arise, suggestions, and pointers.

Here are the nine steps and the chapters to which they correspond:

Promote interest in training as a way to increase the group's effectiveness; set a climate for effective learning	Chapter 5
Identify training needs	Chapter 6
Set training objectives	Chapter 7
Select or develop training activities	Chapter 8
Locate people, groups, and materials which can contribute to the training program	Chapter 9
Assemble training activities into an overall plan	Chapter 10
Make final preparations	Chapter 11
Facilitate training	Chapter 12
Assess progress and modify future training plans	Chapter 13

These steps are in the sequence in which they would usually be carried out. They reflect the variety of things a citizen group trainer must be prepared to do in order to carry out truly effective training. The job may seem awesome, but we think the ideas in these chapters will make it seem possible. And one person doesn't have to do it all. Chapter 9 contains ideas for bringing in other people to help with the training; Chapter 14 suggests that a support group of people from other organizations concerned about training may be very helpful. But most important, these nine steps can be shared with other members of your own citizen group. The exercises in Part III are designed as a structure for group participation in the development of learning activities.

Michael Chan

5 GETTING STARTED

"A journey of a thousand miles begins with a single step," says an old Chinese proverb. That first step is usually the hardest.

Getting your group to set time aside for training may be the single most important contribution you can make toward the goal of developing your group's capacities. The exercise which follows is designed to help you think out a strategy for getting things started. You can do this alone, or with other people who are interested in getting your group or other groups to make a commitment to training.

Exercise: PLANNING FIRST STEPS

number of people: one to many
minimum time: 20 minutes
materials: copies of form below

Process:

1. Identify the barriers to training—the resistances which you expect your group may have. Check items on the list below and/or write down ones which seem to pertain.

- _ group will be reluctant to discuss "weaknesses"
- _ at least some members will be defensive ("we're doing the best we can")
- _ it's hard to think about training needs without any idea of what could be done about the needs we identify
- _ training is only a distraction from the real work of the group; there are more pressing matters
- _ other:
- _ other:

2. Identify components of your "strategy" for presenting the issue of training to your group. Here are some possibilities; check those which seem to apply:

- _ get the group to do a needs survey, to identify possible training needs (using one of the methods in Chapter 6)
- _ hold a discussion of the group's strengths and weaknesses and how these affect its success
- _ identify other community groups which have skills that your group seems to lack; get representatives to explain how their groups developed those skills
- _ persuade a few people first (officers or "opinion leaders")
- _ other:
- _ other:

Look over these strategies in light of the barriers you identified in step 1; are the strategies sufficient to overcome the barriers? If not, what additional strategies might you use?
Rank your chosen strategies according to how successful you think they will be. (Put a "1" beside your first choice, etc.)

3. Decide what it is you want your group to commit itself to as a first step toward developing a training program. Again, here are some possibilities; check those which apply, or use the rank-ordering scheme just described:

- _ appoint a training coordinator and give that person a mandate to take initiative
- _ do a needs survey first, as a basis for deciding whether and how to proceed
- _ give it a try with one specific training need—hold one workshop (or other training activity) to address that need
- _ hold a more extended meeting (or workshop) to explore the possibilities for training
- _ refer the matter to a smaller group (a committee)
- _ make an explicit commitment to develop certain specific skills within the group
- _ circulate this manual and/or other sample training materials
- _ other:
- _ other:

For a citizen group to develop a commitment to training, somebody must take the initiative to stand up and ask for it. Point three in the process above is especially important: you need to know just what it is you're asking of the group.

As you do this, you're taking on the role of change agent—asking the group to change from no explicit attention to skill building (or only a little) to a conscious commitment to meet specific learning objectives. That's an innovative step for many groups, and you may want to know some of the basic principles which have been discovered about the acceptance of innovations:

- Those innovations which can be tested out on a small scale (with little investment of time or money) will usually be accepted more rapidly.
- Certain people are, by their natures, more receptive to innovations than others.
- When the benefits of an innovation to another group or individual can be observed, acceptance is usually more rapid.[1]

1 Based on the summary of research findings by E.M. Rogers and F.F. Shoemaker in **Communication of Innovations**, Free Press, 1971.

Discussion Question:

What do these principles imply about your strategy for getting started?

CREATING A CLIMATE FOR LEARNING

Learning is the natural human response to new situations. Curiosity about our environment and the ways we can interact with it provides a basis for coping successfully, but it is easy to inadvertently inhibit the learning response. Perhaps the admission that "I don't know" is threatening; perhaps the initiators of old solutions are reluctant to accept new ones; perhaps the group thinks it will be unproductive to talk about what they can't do. Even if none of these barriers exist, it may simply be that the group considers itself an action group, and considers its agenda too full already. In any of these cases, the group will need help to establish a positive climate for learning.

Learning is the natural human response to new situations.

There are three main issues that you may need to deal with in order to successfully create a climate for learning: safety, relevance, and success.

- The problem of safety is the problem of feeling that it's OK to say "I don't know and I want to learn."
- The problem of relevance is the need to feel that training is important, that it offers a payoff for the group and for each participant as an individual.
- The issue of success involves the need to distinguish the present situation from any past learning experiences which were not successful, and to sense that the group has the competence as learners and learning planners to carry off a successful learning program and achieve the desired payoff (increased group effectiveness).

Here are some suggestions for how an individual (or a small team) can help a group establish a learning climate which resolves the three basic issues:

1. **Model an openness to learning.** Demonstrate by your example the possibility of saying "I don't know how to do this. Is there anyone who can show me how?" or even "I don't think that we as a group know enough about how to build community support for our ideas. Let's bring someone in who can help us learn how." This may violate an unstated norm that "We don't talk about what we **can't** do—it's too depressing." What makes it all right to do this is the suggestion of what **can** be done—sharing skills, bringing in outside resources. Also, your ease and comfort in making such a statement can quickly open the group up to identifying learning needs and acting on them.

2. **Identify ways that new skills would help.** Members may be doing this spontaneously; "If only we had someone who knew where we could go for funding . . .", but it can also be a structured group activity; suggestions for identifying training needs are given in Chapter 7.

3. **Help the group to develop a positive vision of itself as more powerful as a result of training.** This can be tricky in two ways: There's a temptation to say, "If only we could run projects as successfully as the Othertown Women's Club." That can be demoralizing rather than helpful. And there's the danger of running your own group down in the process of creating a vision of how much better it could be. Better to imagine what your own group **could** do, but also to give yourselves credit for what you **can** do. For example: "We're very good at generating lots of project ideas; what we need is some people who can turn them into detailed and feasible plans."

4. **Correct any misinterpretations of training.** As the group's advocate for training, you may need to stand up in meetings and contradict some mistaken ideas such as: citizen group training does not need to be lecture-style learning; it can and should be much more involving and interesting than the formal education that most of us received. Participants need not sit passively "absorbing knowledge"; they will often be involved in talking, practicing new skills, problem solving, etc.

Citizen group training can be involving, interesting and relevant.

Read the section on the word "training" in the introduction to this manual. A key point is that training is not contrary to action or even separate from it; it can take place on the job—by identifying learning needs which arise in a meeting and taking a few minutes to address them, or by spotting learning which has occurred and taking a few minutes to discuss and consolidate that learning.

5. **Convey the idea that people's feelings about learning are important and can be expressed.** Many feelings do come up in a learning situation—anxiety, annoyance, pride, and delight. Group support for the idea of spending time with training—and success in the training activities—will be more likely if people know that these feelings can be stated openly and without embarrassment. The advocate for training can help things along by listening carefully to statements about feelings, by summarizing what has been said (if done carefully and accurately), by stating his own feelings and by inviting others to state theirs. Negative feelings (self-doubt and annoyance, for example) need to be heard, but the advocate/facilitator can sometimes encourage a participant to identify successes as well, and to find a positive attitude or direction for future learning.

6. **Get things started.** "Nothing succeeds like success," and so there comes a time for every group to stop talking about training and start doing it. There were suggestions earlier in this chapter for different ways to get started; some groups may be willing to make a commitment to a year-long training sequence, while others may need to try it first on a limited scale to see if it helps. The advocate for citizen training eventually needs to become a planner, to devise a first experience which feels like success and helps the group to see that there can be very immediate rewards from training.

6 IDENTIFYING TRAINING NEEDS

As an advocate for citizen group training and skill building, one of the most helpful things you can do is to get your group to identify its training needs exactly. Too many training efforts prove unsuccessful because they lack focus and direction, and because they don't address the real needs of the group. The typical citizen group, meeting weekly or monthly, cannot devote many hours per year to training; unless the first training session hits the mark squarely, a group may decide it can't afford **any** time for training.

Too often the trainer or training coordinator will decide for the group what the training needs are. The trainer may feel that she has special expertise which helps her to analyze the needs, or that she has the time to think carefully about the skills or information which the group needs. It's fine for the trainer to do a lot of thinking about needs, but we recommend very strongly that she involve the whole group, or as many as possible, in the process. All the methods in this chapter for identifying needs can be done with a group; they may have to be adapted to fit the time available, but they all provide a framework for group input into the focus of training.

STARTING POINTS

Most often, when a group comes to CITP for assistance, they have in mind a possible starting point for training. (Later in the chapter we'll consider some methods to use when this is not the case.) Typically, the starting point is some **activity** or **problem area** that is giving the group trouble. Sometimes a group will identify a **topic** for **training.** Here are some examples from our experience:

An activity or task—"We need to know how to prepare a foundation proposal." ". . . write a press release." ". . . run more effective meetings."
A problem—"We don't seem to be able to hold onto members." "We don't have a clear sense of where we're headed." "The agency which we try to influence seems to listen, but doesn't do anything with our input."
A training topic—"We need help with team building." ". . . publicity." ". . . introducing new members to the technical content of our field."

All of these are valid starting points but they all need to be examined and focused before they can provide the basis for a training plan.

The method which follows will help you move from starting points to specific learning outcomes. You will be looking for statements about what the learners (group members) will be able to do. The training needs you identify will probably fall into one or more of these categories:

Exercise: SPECIFYING TRAINING NEEDS

number of people: one to many
minimum time: 45 minutes
materials: copy of worksheet

This is a process which allows you to start from any of the three starting points for training—a task, a problem, or a training topic—and follow through to a statement of very specific learning needs—skills, concepts, understanding, process knowledge, etc. Before starting the exercise, you may want to review the preceding section of the text, titled "Starting Points."

Process:

Note: Numbers of the steps correspond to the numbered boxes and arrows on the worksheet.
Note: Three distinct examples are used to illustrate the steps—a community survey (to illustrate a task as starting point), a health clinic (starting with a problem), and local government (starting with a topic).

1. If your starting point is a task or activity, write it in the top left box on the worksheet.
   Example: conduct a community survey

Before proceeding, ask yourself whether that's really the right task for this point in time, in order to achieve your objectives. Is the task part of the most productive strategy available, or is there an alternate plan that would be more productive? If it's not the best task, revise the task statement or frame a problem statement instead.

2. If your starting point is a problem, write it in the middle left box.
   Example: We can't seem to get any community support for our idea of a neighborhood health clinic.

3. If your starting point is a training topic, write it in the lower left box.
   Example: local government and how it works

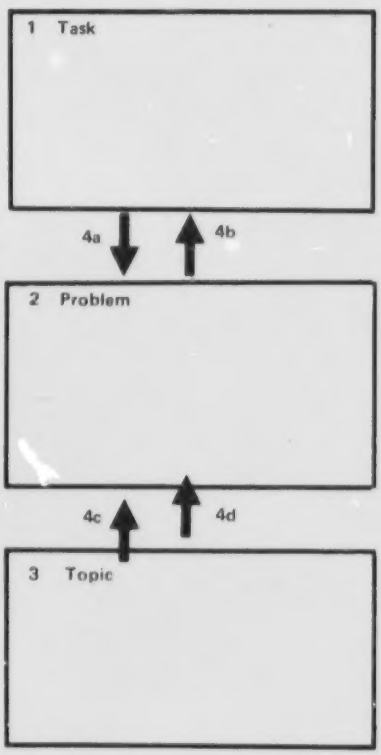
4. Regardless of your initial starting point, try to fill in the task and problem boxes.

   4a) If you started with a task, ask yourself what the difficulty is, or what the underlying problem is.

   4b) If you started with a problem, what task will need to be done to resolve it? (You might postpone this question until after steps 6 and 7.)

   4c) and 4d) if you start with a topic, identify the task(s) that you face which are related to the topic and the problems or issues which are connected to it.

   Example: Starting with the topic, "local government," a corresponding problem might be lack of government action on substandard housing; one related task would be informing local officials about the problem.



5. If possible, identify subtasks which are part of your main task.

Example:

Main Task	Subtasks
conduct survey	write survey
	train interviewers
	conduct interviews
	tabulate and interpret responses

6. Often the initial problem wording is not the most productive, so test out alternative wordings of the problem statement. Consider how the problem looks to different parties. Or think of the problem as a gap between the present state of affairs and some ideal that you're striving for.

Example (revising the wording of Step 2's example): Community residents don't seem to think it's possible to get a neighborhood clinic.

(For more ideas on "Problem Redefinition" see CITP's manual, **Planning, for a Change**, pp. 48-49.)

7. If possible, break the problem into parts. Give separate problem statements for each part.

Example (health clinic): The neighborhood doesn't know how far we've come. The decision makers don't know the extent of need for health care in the neighborhood.

8. Similarly, divide each topic statement into parts (subtopics) and list them.

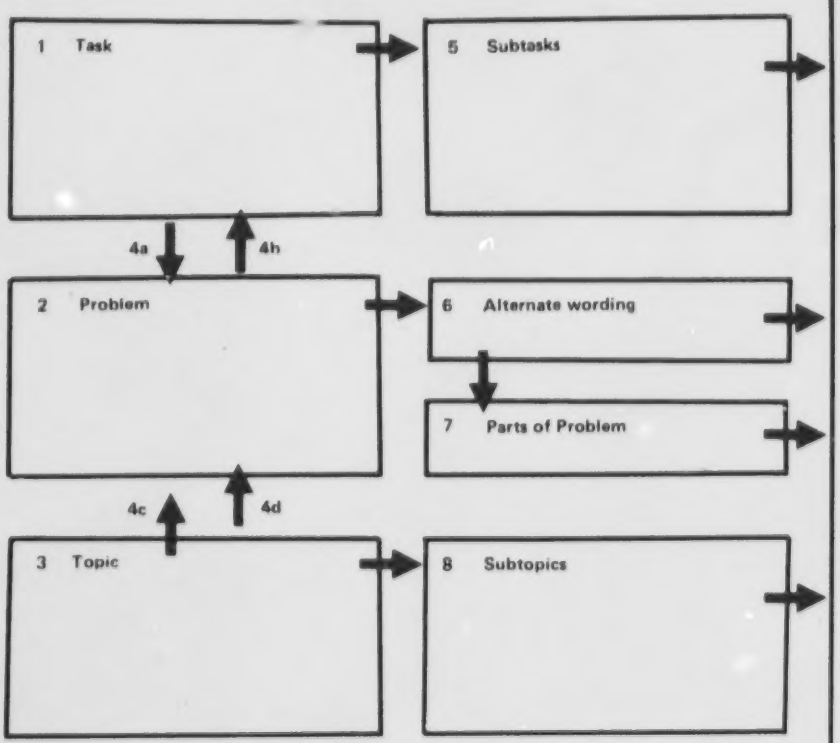
Example: Topic—local government.
Subtopics—local planning; administration of community services (fire, police, etc.); legislative process; opportunities for community involvement.

9. Checkpoint: Is training needed at all? Whether your answer is yes or no, what else would help to resolve the problem or perform the tasks? Money, time, people? elimination of barriers of some kind? change of structure (of your group, or of some other organization or institution)? This information will help you decide how much effort to put into training, and how to strike a balance between training and other approaches such as recruiting new members, starting a lobbying campaign or planning a sit-in.

Example (health clinic): Neighborhood support of the clinic idea can be increased by some organizing strategies which we know already; we will need some **training** before we are ready to negotiate with the decision makers.

WORKSHEET FOR IDENTIFYING TRAINING NEEDS

Broad Topic: _____
(Use one or more separate worksheets for each broad topic.)



9 **Training needed?** — yes — no

Other needs? _____

resources (time, money) _____

_____

_____

_____

outside support _____

_____

_____

_____

elimination of barriers _____

_____

_____

_____

_____

_____

_____

_____

_____

10. Now the key step—specify the training (learning) needs of your citizen group. Use the categories—skills, information, concepts, process-knowledge—if they fit your situation.

> Example (health clinic): Decision-maker support of the clinic may require skills—negotiation, persuasion information—who the decision makers are, what factors guide their decisions.

11. Rate the different learning needs, item by item: mark the top priority items with a double star (**) and the next group with a single star (*). The unstarred items will represent the lowest priority group of needs.

If a group is filling out this worksheet together, each person could be given two or three votes to cast for those needs considered to be most important; the group totals, rather than stars, could be used as ratings.

12. Is it important for everyone in your group to acquire the skills, knowledge, etc.? If so, leave column 12 blank; if not, identify the individuals who have each training need, using their initials or some other code.

13. List approximate time periods during which that training need should be met. For example, if a skill is needed by a particular date, put that date in column 13.

14-15. Columns 14, and 15 are for objectives and targets ("criteria"). Leave them blank for now; Chapter 7 will explain how to develop objectives and targets based on a training need.

Note: A separate worksheet would be needed for each major problem, task, or topic. For example, different worksheets would be needed for our three illustrations—the community survey, health clinic, and local government cases. (The process of completing a worksheet will go more quickly with practice!) Then, if you will rate the importance or urgency of each worksheet relative to the others and review your time guidelines, you will have a rough master plan for training.

(CITP's manual, **Planning, for a Change**, pages 67-71, for suggestions on developing a graphic representation of your overall time sequence for training.)

10 Training needs	11 Rating	12 Who?	13 When	14 Objectives	15 Criteria
skills					
information					
concepts					
other					

41

A GENERAL ASSESSMENT OF NEEDS

So far we have assumed that your group has a starting point for identifying needs– a task, problem, or topic that concerns members and that indicates a training need. Suppose now that you don't have that sort of focus. Perhaps you have several concerns, or perhaps you are starting from a general commitment to training. The methods in the remainder of this chapter provide a basis for specifying topics, problems or tasks; after you have used them, you can go back to the first part of the chapter with some grist for the mill.

METHOD A: THIRTY-ONE FLAVORS

Early in its history, CITP conducted an informal survey of the training needs of citizen group members in Massachusetts. By studying earlier interviews with group leaders and written materials about training, we developed a "menu" of training topics that citizen groups may need help with.

The list is reprinted here; you could distribute copies to everyone in the group. Have them fill out the forms, then collect and tabulate the replies. Or you could use the list as the basis for discussion, perhaps with a large (newsprint) version of the list and voting (show of hands) on each item to let everyone know right away what others see as the needs. The list is on page 41.

To tabulate scores when a group of people uses this questionnaire, first count the number of people that checked each item in the column with the parentheses. For example, if ten people fill out the questionnaire, you may discover that eight out of ten group members consider "Methods for gathering factual information and survey data" to be important to the success of our efforts.

Then tabulate averages for each item on the 1-4 rating. You will then be able to say something like "Methods for gathering factual information and survey data" had an average score of 2.1 on the "adequacy" scale; people think our present abilities on this skill (which we have identified as important) are "less than adequate."

CITP's initial use of this questionnaire was with a not-so-random sample of some 42 citizen group members representing about 20 different organizations. Here are the training areas which they identified as most important:

PRIORITY TRAINING AREAS

1 **Fund raising and budgeting** (item 1)
2 **Planning and implementing** of special **projects** (9)
3 Ways to stay in touch with **community needs** and preferences (3)
4 Knowledge of **organizing strategies** (17)
5 Recruiting and maintaining **membership** (4)
6 **Management of volunteers** (13)
7 Understanding the social and economic **roots of problems**; applying this knowledge when developing goals and projects (22)
8 Providing citizens/volunteers with important and responsible tasks, plus the information and training needed to accomplish these tasks (31).

TRAINING AREAS

STEP ONE: Which areas are most important? 31 different areas of skill and knowledge are listed below. Please review the list and then place a check in the parentheses next to the 10 areas which seem most essential to your group's progress. Then go on to step two.

STEP TWO: How well are you doing? Now please rate your group's present level of skill or knowledge in all 31 areas. Think of the capability of the group overall, for each area, and ask yourself whether it is adequate to meet the group's goals and objectives. In the blank provided, write any number from 1 to 4:

1 = inadequate
2 = less than adequate
3 = adequate
4 = better than adequate

Check 10

Rate all 31

1. ( )____ Fund raising and budgeting
2. ( )____ Information about how the government works
3. ( )____ Ways to stay in touch with community needs and preferences
4. ( )____ Recruiting and maintaining membership
5. ( )____ Goal-setting methods
6. ( )____ How to influence legislation
7. ( )____ Group process and interpersonal relations
8. ( )____ Discussion methods for groups to explore social problems, personal beliefs, etc.
9. ( )____ Planning and implementing special projects
10. ( )____ How to hold officials or agencies accountable
11. ( )____ Decision making and conflict resolution
12. ( )____ Knowledge of global issues (resource shortages, environmental crises, food, etc.) and possible local responses
13. ( )____ Management of volunteers
14. ( )____ Technical content of the group's field
15. ( )____ Ways to promote local decision making in technology and economics
16. ( )____ Holding effective meetings
17. ( )____ Knowledge of organizing strategies (understanding different approaches to social action; building effective campaigns)
18. ( )____ Problem solving methods
19. ( )____ How to develop alternative or community-based programs
20. ( )____ Methods for gathering factual information and survey data
21. ( )____ Ways of sharing skills and information, especially with new members
22. ( )____ Understanding the social and economic roots of problems, applying this knowledge when developing goals and projects
23. ( )____ Designing mechanisms for effective citizen participation
24. ( )____ Long-range community planning; envisioning "alternative futures"
25. ( )____ Knowledge about the role or mandate of your citizen board or citizen group
26. ( )____ Understanding the economics and politics of social services
27. ( )____ How to set up an appropriate organizational structure with a clear designation of roles and responsibilities
28. ( )____ How to run public relations or mass media campaigns
29. ( )____ How to acquire more power; how to increase the group's influence over important decisions
30. ( )____ Monitoring and evaluating program performance
31. ( )____ Providing citizens/volunteers with important and responsible tasks, plus the information and training needed to accomplish these tasks
32. ( )____ other
33. ( )____ other
34. ( )____ other

Many of the organizations that have come to CITP for assistance have started with an interest in one of these topics, and fundraising and budgeting has been the single most common concern. However, it is not necessarily the best starting point. If a group is having trouble with funding, it may be because there is no clear sense of purpose, or it may be that interpersonal hassles get in the way of developing an effective fundraising program.

At CITP, we are prone to take the top priority training area as one possible place to start, but we like to probe for other problems and needs. You will be doing this too, if you use the worksheet earlier in this chapter. Take the top few training areas identified from the "31 Flavors" list, and plug each of them into the "Training Topics" box (3) on the worksheet. Then steps 4d, 6 and 7 will call on you to explore the related or underlying problems connected with that topic, and you may decide from that that another concern takes greater priority or is the cause of the first problem. The training area selected as top priority may be only a symptom, or the tip of the iceberg.

METHOD B: SPOTTING PROBLEMS

Method A asked members to review a list of training areas or topics; Method B probes for group problems by raising questions about the many areas that may give rise to difficulties. The process is much like giving your group a physical—reviewing every aspect of its health and identifying any that need remedial action. The list can be reviewed alone, but ideally it would be the focus of a group discussion.

This can be a time-consuming process because it is important to allow time for a full range of opinions to be aired. However, many groups will find this a provocative and rewarding way to begin a training process. It's less structured than the worksheet or the training area questionnaire, and it may provide the thinking space that some groups need to spell out the concerns behind their interest in training.

Obviously these are only some of the possible questions. You will probably be able to develop other questions which are even more appropriate to your group's situation. Here are the questions:

AN ORGANIZATIONAL DIAGNOSTIC

Organizational History/Image Does your organization have a positive image of itself? What is its image in the eyes of outsiders? How has the history of the organization developed and how has this affected its current status? What have been the major successes and failures?

Purposes, Roles, and Goals Are the goals of the organization clear to all and agreed upon? Are they achievable? Are people's roles in fulfilling those goals clear and agreed upon? Are the goals clearly written? Are some unwritten? Does the group, as a whole, agree about what the organization should accomplish over the next three years? Is there a process for reviewing the goal-setting process?

Membership Does the organization have a clear idea about who its potential members are? Does the organization currently have the kind of people in its membership who are necessary to carry out the goals of the organization? Are there sufficient skills, interests, varied backgrounds and perspectives? Is the membership too homogeneous? too disparate? Are there too few members, or too many? Is there a system for recruiting members? What is your turnover rate? What are the reasons for turnover? Who tends to leave; who tends to stay? Why are your members, members?

Group Dynamics Are people getting along with one another, or are the interpersonal dynamics limiting the effectiveness of the organization in reaching its goals? Do some members have personal purposes which are in conflict with the group's goals? Are the decision-making processes clear, effective, and acceptable to all? Are there people in the group who can help the group examine and improve its process? Is there time spent on this?

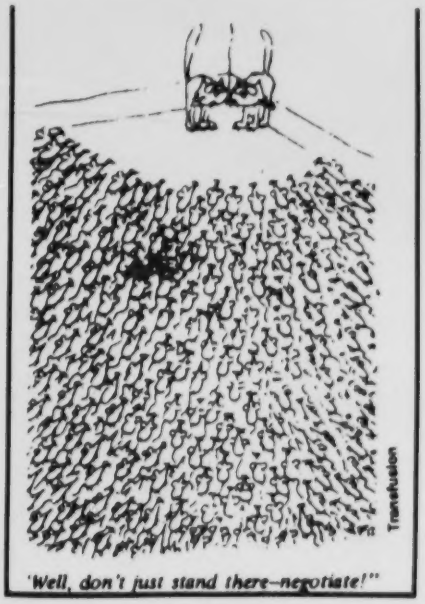
Relations with Other Organizations Is the organization getting the most out of its relations with other agencies? What, if any, are the powers outside of the organization which may be subverting (intentionally or not) the effective accomplishment of the organization's goals? Are there groups that share your goals? Are there agencies which could help which are not being used? How much time is being spent building relations with other organizations, and how?

Paid and Volunteer Participants In what way is your organization affected by any pay differences that exist? Do unpaid members resent paid staff, or place difficult expectations on them because they are paid? Do paid staff resent a higher-paid director? How are salaries determined? How often is this issue reviewed?

Commitment Do staff and volunteers have a commitment to the organization as well as to the goals of the organization? Do people need or want recognition for their commitment? In what way is commitment rewarded? What is considered acceptable work or commitment?

Organizational Systems Are the systems by which the group functions sufficiently organized? Are planning, record keeping, communication, accountability, and evaluation dealt with adequately? How are tasks allocated? How is accountability carried out? How are these systems being established? Do members understand and show interest in these operations?

Leadership Does the formal leadership structure contribute to coordination and progress, or does it breed chaos and resentment? Is there an informal leadership structure which challenges or neutralizes the formal one? Are all members making use of their leadership and initiative, and are these qualities respected and rewarded by others? How are formal leaders designated? How often does the leadership change? How is feedback given to leaders and how open to influence are they? What are the leaders' strengths and weaknesses?



"Well, don't just stand there—negotiate!"

Resources Does the organization have sufficient resources to achieve its goals? If not, why not? Is it using its resources effectively? Are there additional resources which could be located with a reasonable effort? Does the organization think only of money as the critical resource, rather than identifying sources of donated materials or ways to proceed without additional funds? What resource would you be most eager to expand? Which is the first and the last resource you would be willing to give up? What proportion of the organization's time is spent locating resources?

What other potential problem areas for your group do you think should be examined?

A.

B.

C.

Not all the concerns which you identify using this question list will lead to **training** needs. You may decide that what you need is a new set of officers or a recruitment drive to bring in more members, or a better accounting system. However, you are more than likely to find concerns for which training is at least part of the answer. The worksheet earlier in this chapter provides a way to start with a problem statement (step 2) and work it through to a decision (step 9) about training needs and other needs.

METHOD C: TASK ANALYSIS

A third method for identifying training needs is based on a systematic look at the tasks which the group needs to perform. The basic question in this method is as follows:

> 1) What tasks or activities do you carry out in your work with this group?

If there are new programs which are about to begin, a second question will be helpful:

> 2) What tasks or activities do you think the group will have to carry out in order to run the new programs?

The next questions follow:

> 3) What skills or information would help you to carry out each of these tasks more effectively?
>
> 4) Of the skills and information you have identified as helpful, which ones would be most important to develop first?

A fifth question can be added as a way of putting training needs in a more positive context:

> 5) What tasks are we performing well because of the skills and information we already have?

These five questions could be raised in a group discussion. They could be used by a small team of interviewers (members of the group) who meet individually with leaders, former leaders, rank-and-file members and new members, and record the responses of each. Or it could be done as a meeting or workshop in which each person interviews, and is interviewed by, one other member of the group. Here's a plan for such a workshop.

Exercise: IDENTIFYING TRAINING NEEDS THROUGH TASK ANALYSIS

number of people: four to many (preferably all the members of the organization)
minimum time: 45 minutes
materials: copies of the five questions from Method C (one per person), with adequate space for recording replies

Process:

1. Explain the purpose of the task analysis to the group; review the broader purpose of developing some training activities which will help the group be more effective.
2. Distribute the question lists and give the following instructions:

"I'd like to have you divide into pairs. Find someone that you'd enjoy working with for the next ten or fifteen minutes, and agree who will be the first interviewer. That person should ask each question, listen attentively, and record the replies of the interviewee. Take your time with the questions, there'll be five or eight minutes each way, and I'll let you know when it's nearly time to switch roles. Then the interviewee will become the interviewer and will take a fresh copy of the question list and record their partner's responses."

3. During the interview process, keep time and also make sure every pair understands the instructions and is making progress. Use your judgment about whether to extend the questioning beyond five minutes, and give a minute's warning before it's time to switch or to end.
4. Summarize the findings on newsprint with felt pens. You might start by asking for responses to the **last** question and recording the key words on one sheet of newsprint. That way a sense of the group's strengths will provide a positive and optimistic basis for considering training needs. Then, depending on how much time the group wishes to spend on this, go through each question and ask members to call out answers, or skip to the fourth question and list only the top priority needs for skills and information.
5. This could lead nicely into a discussion about how to address these needs; if you cannot hold the discussion at this time, be sure to schedule it.

A task analysis was the basis for Part III of this training manual. We identified the tasks which seemed most crucial to the success of a within-group training program, and the skills and information which would help you to carry out those tasks.

The information from your task analysis can be recorded on copies of the worksheet (earlier in this chapter). Chapter 8 will provide suggestions for developing methods based on your training needs. First, however, Chapter 7 urges you to refine your need statements one step further by specifying objectives and targeting the outcomes you hope to achieve in your training program.

7 SETTING LEARNING OBJECTIVES

Question: Assume that you have identified the learning needs of your citizen group (column A in the example below); what's the next step in planning your learning program? Should your thinking resemble column B or column C?

Column A	Column B	Column C
Group members need interviewing skills.	Participants (group members) will be able to: 1) state the major "do's" and "don't's" of interviewing; 2) conduct an interview without any of the major "don't's"; 3) record data completely and accurately.	The group will: 1) listen to a brief talk on interviewing; 2) Role-play the interview situation; 3) Discuss response data recorded during role-play.

Here are some other reasons to set specific objectives:

- You will have a clear reminder of what you're trying to accomplish; if the first training method you try doesn't succeed, you will know that you have to try another.
- The entire group will know exactly what the training activity is trying to accomplish. Participants are then more likely to buy in to the activity (or they may be able to make a decision that they don't need to participate in a given activity).
- Stating purposes in terms of what the learner will be able to do is a safeguard against irrelevant training. Vague areas of need get focused into specific purposes (objectives), and these objectives serve as a reminder of what the training activities must accomplish.
- In the course of specifying objectives, it will be possible to identify those aspects of the training need which are already met. For example, group members may already have some of the specific skills required for interviewing, and this will probably become apparent during the process of setting objectives.

Many times the planning of learning **doesn't** begin with a statement of needs (column A); it often starts with column C. That's the language of learning **methods**—the "what will we do on Monday?" approach: finding activities to fill the time, whether they meet a need or not. If there's any analysis of learner needs, it's probably intuitive and its not stated explicitly and examined.

Sometimes planning begins with needs but skips directly to methods (column A to column C). That's better than the first approach, but we recommend that you include all three steps: stating needs (column A), identifying objectives (column B), and **then** choosing methods (column C).

It's a lot like the pool shark calling her shots, "Five-ball in the corner pocket." It makes the game a lot tougher; she can't claim that just **any** ball dropped is a success. Similarly, the trainer can't claim that any learning that occurs is a success. Learning may occur which is beyond the scope of the objectives, and it may be very valuable, but it is in addition to the planned learning, not a substitute for it. Also, you can't claim real success when just a few learning needs have been met (nor can the pool shark win the game just by making a few tricky shots). You need to spell out the entire package of learning objectives which will meet the need and measure your group's progress against that whole package.

THE LANGUAGE OF OBJECTIVES

A learning objective is a statement about the desired **outcome** of the training activity; it is a statement about what the learner(s) will be able to do. It is possible to develop a statement of what the learner will be able to do regardless of whether the learning need is for skills, knowledge, attitudes, or process-knowledge:

Participants will be able to . . .
. . . state certain information (knowledge).
. . . perform certain tasks (skills).
. . . demonstrate interest in (topic or skill) (attitude)[1]
. . . describe and carry out a process for (process-knowledge)[2]

Objectives stated in this form are sometimes called behavioral objectives because they describe the desired behaviors which the learners will be capable of. Some educators choose to take one more step in specifying objectives, by writing performance criteria. Another name for performance criteria would be "targets" since their real purpose is to let you know when you can stop—when you've done enough training to meet a particular need.

Often, performance criteria are stated in numerical terms:

Group members will be able to state **three** "do's" and **three** "don't's" of interviewing.
Group members will be able to conduct an interview with **no** major "don't's."

Sometimes, a performance criterion will allow for the possibility that not all the participants will reach the standard:

Four-fifths of all participants will be able to conduct an interview with no major "don't's."

Sometimes it's difficult to specify these standards or targets. We recommend that you try; it will make it much easier to assess progress (Chapter 13) if you can be this specific. But you may decide that a behavioral objective is as far as you need to take it.

The following exercise will guide you through the process of writing learning objectives. Note that it can be used by an individual planner or by a group.

Exercise: WRITING LEARNING OBJECTIVES

number of people: one to many
minimum time: 10 minutes
materials: paper and pencil; completed worksheet from Chapter 6

Process:

1. If you haven't used the Worksheet from Chapter 6, complete it through point 13 for one task, problem or topic. (If you lack the time to do that now, identify a few skills, concepts, or information which the group needs and write it in column 10.)
2. Taking each item in column 10, one-by-one, write objectives in such a form that they will complete a sentence beginning "Participants will be able to . . ." Once you are confident about the wording, write the objective into column 14 of the Worksheet, opposite the need (column 10) to which it corresponds.
3. Attempt to write performance criteria for each objective—numerical standards or some other indication that the objective has been achieved. Record these criteria in column 15.
4. Individually, or in a group discussion, answer the questions which follow.

Discussion Questions:

- *Were you able to phrase all the objectives as things participants will be able to do?*
- *Are your objectives broad, or specific, or a mixture?*
- *Were you able to set performance criteria for all the objectives? What type of criteria did you set?*

1 Some would question whether attitudinal objectives constitute training or indoctrination. We think this questioning is appropriate. The example here is based on an attitude of **interest** in some topic or skill, which we think is often a legitimate objective (depending on what the topic or skill is). Belief in a specified point of view does not seem to us to be an appropriate learning objective, although it is a common one in many forms of education.

2 More on process knowledge in Chapter 8, under "Group 3."

LEARNING OBJECTIVES: A DISSENTING OPINION

Most educators these days insist on the importance of setting very specific learning objectives. Anyone who doesn't do this is taking short-cuts, being lazy, or resisting the idea that education ought to achieve some predetermined outcomes. Maybe so, but there's one dissenting viewpoint that's worth passing along.

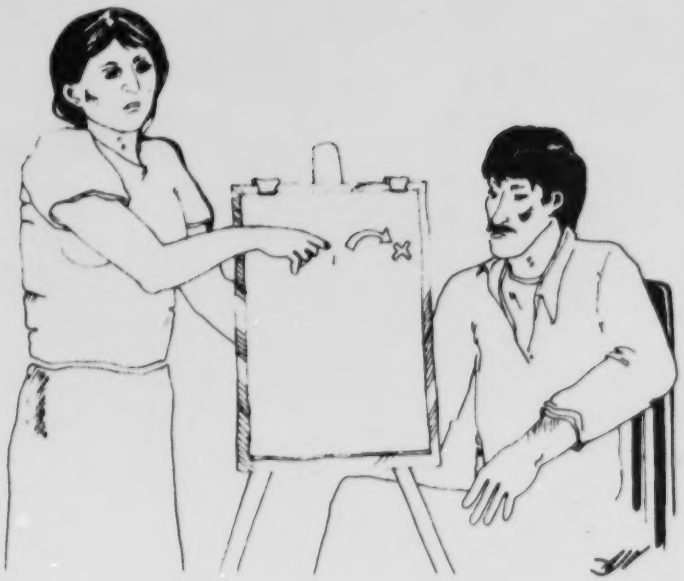
Learners, whether children or adults, have their own purposes and objectives in every situation. No educator can specify what a given individual will get out of a given situation; that's up to the individual as he does his best to get what he can from the situation.

Also, no two individuals will have exactly the same objectives at the same time. The job for educators is not to set objectives and then design activities which carry out those objectives on passive learners (like a car-wash carries out its purpose on an automobile). The educator's job is to create learning activities or environments which are rich in possible learning experiences. That way, learners can come with their own objectives and go away with a wide variety of different learnings.

The educator who has designed such a situation (activity or environment) might be able to say some of the objectives she thinks could be fulfilled, but in a productive learning situation, the learners will discover new experiences and outcomes that hadn't even been thought of. And there will be many types of learning occurring at the same time.

The educator's job is to create learning activities or environments which are rich in possible learning experiences.

So the educator's job is to design situations which are rich, rewarding and relevant—and objectives be damned! Come to think of it, the educator could share the responsibility for designing the situation with the learners!



Discussion Questions:

- *Do you agree with the viewpoint expressed above? Why or why not?*
- *Is a study of training needs appropriate, assuming that the trainer's job is to design situations which are "rich, rewarding and relevant"?*
- *Is it appropriate to convert needs into objectives, even if this is the type of method which you'll use?*
- *How will you know whether this type of learning is successful?*

SETTING PRIORITIES

If you've followed the exercises of Chapter 6 and 7 so far, you may have generated a lot of different needs and objectives. Chapter 8 has to do with identifying the learning activities which can meet your objectives, but before moving to that topic, you will want a sense of which objectives to address first.

Column 11 of the worksheet in Chapter 6 asked for an initial sense of how important the different needs were. The following exercise does the same thing, but more thoroughly.

Exercise:
SCREENING LEARNING OBJECTIVES

number of people: one to many
materials: newsprint and felt pens, list of learning objectives
minimum time: 20 minutes

Suppose that you have developed a list of learning objectives, perhaps by carrying out the previous exercise. The next task is to sort out the most important and most urgent. This exercise is designed to help you do that.

Process:

1. Create a table like the one shown here.

Objective	R	*	F	I

2. Under the column labeled "R" put a letter R beside each objective which will help the group a good deal toward meeting its basic goals. (R stands for relevance.)

Under the column labeled "*", distinguish those objectives which only a few people need to acquire from those which the whole group will need to work at. Use a double asterisk (**) for those which the whole group should attend to and a single asterisk for those which only a few (1-3 people) need to deal with. (Example: the whole group may need to have a basic understanding of fund raising possibilities and procedures, but you may decide that it's adequate for only two or three to know how to write proposals.)

Under the column labeled "F," put a letter F if you think it's feasible at this point for your group to carry out the learning objective. In other words, do you think you have the time, the training materials, the talent, the methods to succeed? If not, or if it's doubtful, leave that column blank.

Under the column labeled "I," put an I if there seems to be interest among the group members in pursuing the particular objective.

3. You now have a lot of information about the learning objectives. Take some time to look over what you have, and then decide which objectives should receive priority. There are at least two ways to do this:
   a. Simply add up the number of marks each objective received. Each R, F, I, and ** counts one. Put the numbers to the left of the objectives, then determine the priority according to these numbers.
   b. You may feel that the Rs, **s, Fs, and Is are too much like apples and oranges—too different to just add them up. You may prefer to use some mental arithmetic of your own to decide on the most important objectives, taking the coded information into account in whatever way you see fit. Have everyone involved in the discussion cast votes for the top three (or so) items—three points for first, two for second, and one for third. Then add these points up to get a ranking of the top priority objectives.

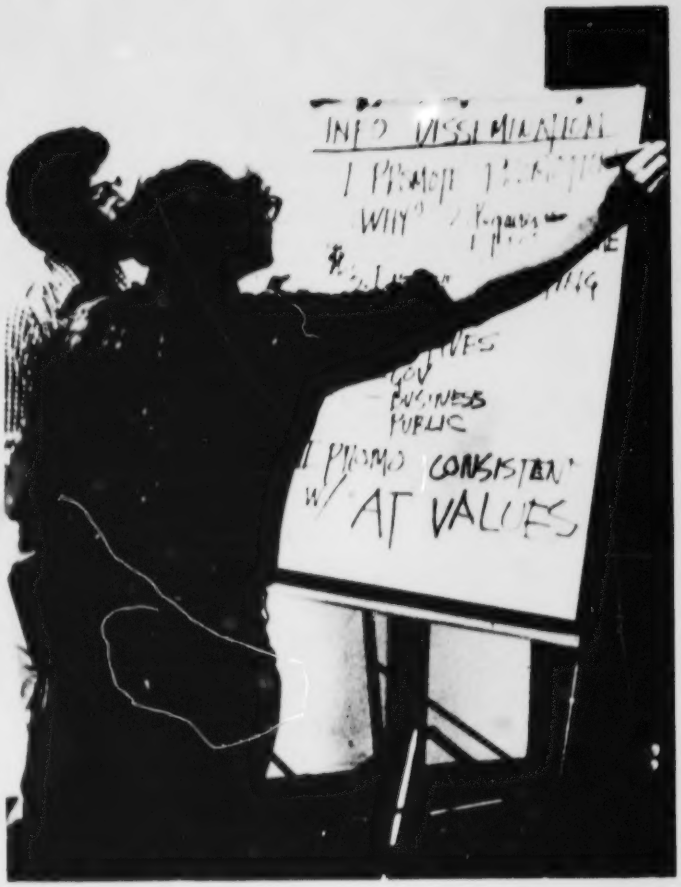
4. Discuss the appropriate sequencing of objectives. It doesn't necessarily follow that the most important objective should come first. Consider what you have to know before you can learn something else. (Chapter 10 has more on the sequencing of learning activities.)

THE AMOEBA MODEL

Here's a tongue-in-cheek approach to learning theory which points to a serious and important choice about training priorities—do you emphasize the **gaps** in a group's skills or do you accentuate the positive—building on the strengths? Here's the theory:

I think learning is like an amoeba. Each strength is like one of the amoeba's longest "arms" and each weakness is like one of the "valleys" in the amoeba's perimeter. As an educator, or a learner, I want to know: would I do better to "accentuate the positive" first, or to "eliminate the negative"? The amoeba's motion suggests an answer; an amoeba moves by "flowing" in the direction of one of its longer "arms" and bringing the rest along with it. Similarly a learner might move the fastest if she is allowed to build on her strengths, and may in fact be motivated to fill in gaps (the difficult topics, whether they be long division, or public speaking, or knowledge of local government) when those are needed in order to keep "flowing" with her strengths.

Does this apply to citizen group training? Perhaps; it's up to you decide. Your decision will indicate to you whether to emphasize needs and problems when setting learning priorities or whether to identify strengths or abilities which people enjoy using.



This chapter started with a comparison of the language of **needs, objectives** and learning **activities.** We said that a statement about what the group will do in the learning session ("role-play the interview situation") doesn't qualify as an objective. You need to specify what the learner will be able to do as a result of the learning activity.

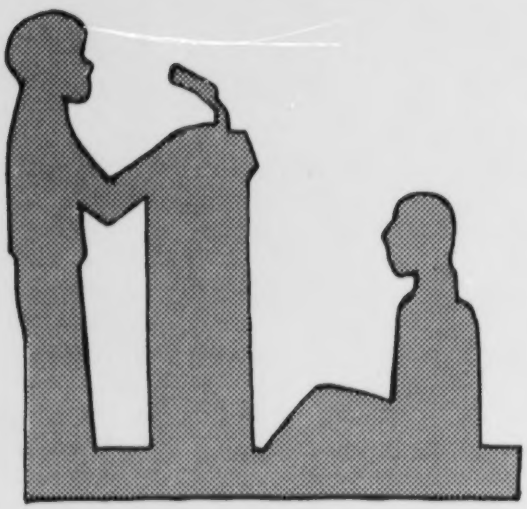
There is a catch. (Isn't there always a catch?) Often, you may decide that the best way to be able to do something is to practice doing it. If so, then your activity will resemble your objective. If you want people to be able to conduct interviews (according to some standard of quality), you'd be likely to want them to conduct interviews during the training session, with coaching and suggestions. So if you have specified your training objectives, you've gone a long way toward designing your training activities, which is the topic of the next chapter.

8 DEVELOPING LEARNING ACTIVITIES

This chapter finally brings us to the point where many trainers are tempted to start: identifying and choosing learning activities. Hopefully, you've taken the preceding chapters in sequence and you come to this one with a clear picture of your group's training needs and objectives. If so, you're prepared to select methods which are the most appropriate ones for your group's current situation.

This chapter will be of interest whether you decide to use "off-the-shelf" training activities prepared by another source (such as those in the CITP manuals) or design your own. The chapter contains the following:

- six general strategies for planning a learning activity
- an inventory of training methods
- illustrations of many of these methods, drawn from the other CITP manuals
- detailed guidelines for using several key methods
- ideas and suggestions for developing new activities
- a procedure and worksheet for selecting the best activity from among several possibilites.



Throughout the chapter, "method" refers to a general type of training experience, such as a mini-lecture, role-play, focused discussion or problem-solving exercise. "Activity" refers to a specific training experience such as a mini-lecture about holding elected officials accountable, or a simulation based on current problems in police-community relations.

There are two basic rules, or guiding principles, when developing learning activities. The first rule can be stated as follows: Set your objectives before you consider methods or activities; then make sure that any activities you identify or create will address the objectives. Form should follow function; the activities must meet the group's needs or they will be a waste of time. (There is an exception to this rule, however. If you get really stuck trying to identify needs or objectives, think about activities that seem like they would be useful. Then reason backwards to needs and objectives by asking yourself, "What purpose would this activity serve?")

Identify several possible activities, then choose the best.

The second rule reads: Identify several possible activities which address a particular objective before you choose one. There are no exceptions to this rule, because you don't get the best learning plan if you use the first activity or method that come to mind. Effective planning means identifying several possible activities, perhaps inventing some new ones, and then selecting the best, the most appropriate one.

SIX STRATEGIES FOR DEVELOPING LEARNING ACTIVITIES

Identifying effective, appropriate training activities is a challenge even to the experienced trainer, and it may seem like an awesome responsibility to the novice. However, it can quickly become the most interesting and satisfying part of the training coordinator's job.

There are some sure-fire ways to generate possible methods...

This chapter lays out the choices in a review of some popular methods. But first, a word of reassurance: there are at least six straightforward approaches for developing training activities. From among these six general strategies, you are almost guaranteed of finding a workable training method for any particular situation. Here they are:

1) **Find an activity which does the job.** Exercises in the CITP training manuals are intended for use by citizen group members who see themselves in a trainer or leader role. Instructions are spelled out in careful step-by-step sequence. There are other training manuals (many of them listed in the CITP manual resource sections) which you will find easy to use. Scanning a number of these manuals will help you develop a sense of the possibilities.

Another way to develop familiarity with possible learning activities is to attend workshops and training conferences as frequently as possible. Collect materials and take notes on the directions and your reactions so that you can lead the same activity back home if it is good, or modify it if necessary. See Chapter 9 under "Materials" for more ideas.

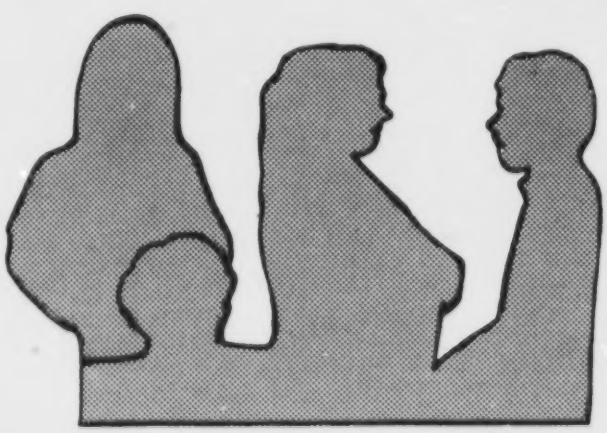
2) **Bring in a resource person.** This doesn't need to be an expert in the traditional sense; there are people and groups in every community who have faced the same issues which your group is confronting, and people with the skills which your members want to acquire. These people may be willing to come to your group for a skill sharing session. A word of caution, however—don't invite someone to give a lecture. Ask for a demonstration (of a skill) or a discussion (of an issue) or a question/answer session—some method which lets your group members shape the presentation by asking for the information that they want. See Chapter 9 under "People" and "Organizations."

3) **Ask the right questions.** Whether you call for a special discussion period or come up with a spontaneous question in the middle of a meeting, you can produce a lot of learning by asking the right question at the right time. Here are some general ideas for framing good learning questions:

a) Ask about the underlying causes of social problems or group difficulties.
b) Ask about alternatives—different ways of doing things, different understandings of what's going on.
c) Ask about recent successes. "What was it we did that worked so well?" Look for chances to consolidate learning that has already taken place.
d) You don't have to do all the questioning. Call a session to "ask ourselves some tough questions" but let the questions come from the group.

For more ideas, see the "Discussion" section later in this chapter.

4) **Re-create a situation** (and the feelings that go with it). A role-play is an excellent way to rehearse for a foundation interview or radio talk show, prepare for a door-to-door survey, or even look at an internal problem such as why meetings bog down. In all these cases, members usually have the information needed, but require help to become comfortable enough with the situation that they can use the information they have. It's important to simulate the troublesome situation as accurately as possible. Don't impose too much seriousness on a role-play, however; laughter and enjoyment are often indications that it's doing just what you want it to do. There are other possible uses of role-plays and simulations; see "Group 4" in the Inventory of Training Methods, later in this chapter.



5) **Spell out a process and lead the group through it.** Often when a group finds itself in muddy waters, it's because no one has a good sense of how to proceed. If someone can figure out a process that will allow the group to think together about the problem then you can make some progress once again. All of the CITP manuals transmit processes—for defining goals, for thinking up program ideas, for making decisions, for getting community support, for planning a fund-raising campaign, for improving communications, or, in this case, for planning learning activities. Put the process into cookbook form, with clear, numbered steps so that everyone knows what's happening, and go through the steps slowly enough that everyone has the opportunity to participate. A slow run through a process will also allow everyone to assess the value of each step and to understand the sequence so that it can be reused later, when a similar situation arises.

See Group 3 and Group 7 in the Inventory of Training Methods (pages 55 and 63) for more ideas and examples.

6) **Support the learning efforts of individual members.** Many people—perhaps most—have the habit of creating learning projects for themselves—to learn French cooking, to acquire some new job skills, to become a more effective parent, to learn more about the effects of multinational corporations, etc. For an active citizen group member, a likely learning project would be to acquire new citizen skills.

Individual learning may be the best way for a few members to acquire skills that the entire group doesn't need or isn't motivated to acquire. A training coordinator can help individual members with their skill building efforts in a number of ways:

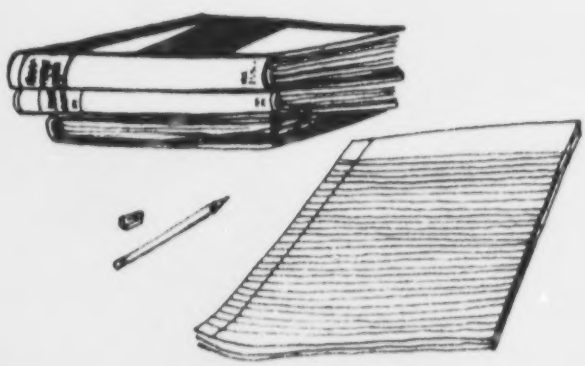
a) by helping to clarify their learning objectives, perhaps in a support group setting.
b) by helping them to connect with the resources they need—books, other people, or whatever.
c) by providing times for individuals to assess their learnings, to report back to a support group or the entire organizaton, and to translate "learning accomplished" into "new capabilities" available for the group to draw on.

AN INVENTORY OF TRAINING METHODS

The experienced car mechanic usually has an elaborate set of tools, a lot of know-how (how to use them to get the job done without busted knuckles or aching muscles) and a lot of "know-when" (when to use a particular tool). The novice mechanic (or the do-it-yourselfer) usually starts out with a basic set of tools and buys additional tools when they're needed. But the novice also needs some basic know-how and "know-when" in order to start using the basic tools.

We suspect the novice trainer is really in the same boat: in order to feel confident about starting out as a trainer, you need a basic toolkit, some know-how and some "know-when." Unlike the mechanic, you're going to have an audience when you haul out your tools and start to work. (You're also likely to have some stage-fright; it's almost inevitable.) But also, unlike the mechanic, you have the possibility of rehearsing before you go "on" for real.

There are many methods (tools) used by adult educators. Various books on the subject describe them and give suggestions for their use. (**Planning, Conducting and Evaluating Workshops,** by Larry Davis and Earl McCallon (Austin: Learning Concepts, 1974) and **The Modern Practice of Adult Education**, by Malcolm Knowles (New York: Association Press, 1970) are two of our favorites.) Here, we focus on the methods which are most appropriate for citizen involvement training—the methods used in, or compatible with, the other manuals in the CITP training manual series. There are seven groups of methods:



Group 1: **Information presentation methods**—mini-lectures, short readings, longer readings, panel discussion, debates, audiovisual materials, etc.

Group 2: **Skill practice methods**—problem sets, in-basket exercises, apprenticeships, drill, coaching.

Group 3: **Process-knowledge methods**—step-by-step instructions, checklists, worksheets, planning guides, demonstrations, etc.

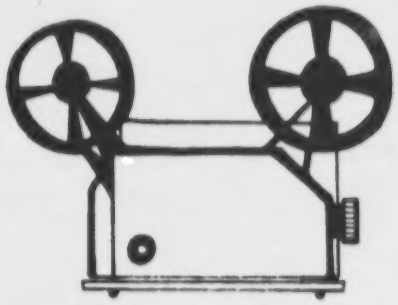
Group 4: **Simulation techniques**—role-plays, problem scenarios, simulation games.

Group 5: **Process observation methods**—stop-action, fishbowl, etc.

Group 6: **Discussion methods**—guided discussion, option lists, case studies, quick discussion techniques.

Group 7: **Problem-solving and creative thinking methods**—brainstorm, consultation, etc.

Each type is defined and suggestions are given for its successful use. There are a few featured methods which receive more detailed suggestions; these are highlighted because they are commonly used (or misused) or, in some cases, because they are unfamiliar but quite useful. For some methods there are guidelines for creating new activities of that type; for others there are references to the exercises in other CITP manuals which illustrate different applications of the methods.



Group 1: Information Presentation Methods

Recommended for: facts, concepts, principles, interpretations

Education is too often equated with the presentation of information. Much of adult education involves other types of learning than the presentation of information, such as the acquisition of new skills (or process-knowledge), the exploration of values and judgments. However, since it is often helpful or necessary for group members to have a shared information-base, the trainer needs to be able to choose a method which maintains a high level of interest and enthusiasm, rather than turning learners into passive recipients of "wisdom."

Mini-lecture: verbal presentation of less than five minutes. Can be followed by a more active technique (such as role play, for example) to allow participants to utilize (test out) the new information. Presentor of information need not be the facilitator. Outside resource people can be brought in, or the role of presentor can be rotated (a seminar—although this label may sound too academic for many). The advantage over a full-length lecture is that it minimizes the passive role of the learners and (hopefully) allows an immediate testing out of new information through discussion and/or activities.

Short readings (read silently during a meeting or workshop): An efficient means for sharing certain types of information without placing the facilitator in the role of ultimate authority. Readings, of course, should be carefully selected for appropriateness and also for a style of presentation which is well matched to the sophistication and reading skills of the participants. Readings to be used during a workshop should be timed beforehand so that the facilitator will know about how long they will take to read. Three minutes is a good maximum; longer articles will diffuse energy and will create an extended time during which the faster readers wait for others to finish.

Longer readings: If interesting and worthwhile readings are available as "homework" and the group is willing to accept the idea of doing such readings, then this can be a constructive contribution to group learning. Everyone need not read the same "assignment"; different readings can promote discussion.

Panel discussion or debate: Presents information and clarifies differences of opinion in a manner which is often more interesting than a lecture by one individual. Has the same drawback as a lecture, however: the possibility that the passive role of the audience may reduce the effectiveness of the learning experience.

Films, videotapes, slide shows, etc.: Carefully selected audio-visual materials can provide factual information, illustrate the range of opinion about an issue, or illustrate ways that different groups or communities have dealt with similar problems.

Good visual or audio methods often have a greater impact than other information-presentation methods. Their "richness" allows for greater interpretation by learners, leading frequently to discussions. Their concrete imagery allows viewers to ground facts in specific settings; talking about unemployment rates often has less of an impact than a couple slides of hungry children and long job lines.

Low quality or irrelevant materials can be worse than a dull night of commercial TV; they are prone to impart a feeling of inertia to their captive vi[illegible]. On the other hand, some of the [illegible] exciting uses of media today are by [illegible]nprofessional crews from community groups. Their commitment to sharing their viewpoints and successes usually shines through, whatever the technical quality may be.

Effective media presentations often increase the learners' motivation to pursue a topic or concern.

Other methods of information presentation: All the training methods which follow have the ability to impart information in varying degrees. Some, such as simulation, may seem to impart relatively little information but are quite effective because they provide a motivation for assimilating new information, a context in which to practice using it, and a setting which encourages spontaneous sharing of additional information among participants.

Often the most effective methods are combinations, such as mini-lecture plus case study. It is generally good practice to follow an information presentation with some activity which allows for reaction and assimilation, the most common being some form of discussion.

Group 2: Skill Practice Methods

Recommended for: physical skills, simple mental skills

Baseball players take batting practice; piano players practice scales; actors practice their parts. But is there a place for skill practice in citizen group training? Perhaps not.

Practice of physical skills is designed to make them come naturally—to smooth out the flow of a series of component tasks. It's designed to improve accuracy and sometimes to build capability or endurance by developing muscles. With coaching, the practice session may result in changes in the way the task is performed—the batter's timing, the pianist's finger position, the actor's tone of voice. Skill practice may develop judgment—the batter's sense of which pitches to let go by; the pianist's ability to judge the evenness of the notes; the actor's awareness of loudness and timing.

Occasionally physical skills are needed in a citizen group: operating a mimeograph machine is part physical coordination, part process-knowledge, and part judgement. More often, citizen group members need mental skills. For simple skills, practice sessions might sometimes be appropriate, but will probably provoke unpleasant memories of practicing multiplication of fractions or long division.

Most citizen group skills are mor complex. Some, such as an interview with a possible funding source, deserve practice and coaching. Many are a matter of acquiring process-knowledge—knowing what step it is useful to take next—without much problem acquiring the knack of any particular step. These process-knowledge situations constitute Group 3.

In other words, as mental tasks become more complex, the appropriate learning method may not be skill-practice, but rather process-learning (Group 3), or perhaps role play (Group 4) or problem-solving (Group 7).

Problem sets: Exercises based on the model of math or science problems from school. Citizen groups might identify a list of questions or situations which members need to be able to deal with.

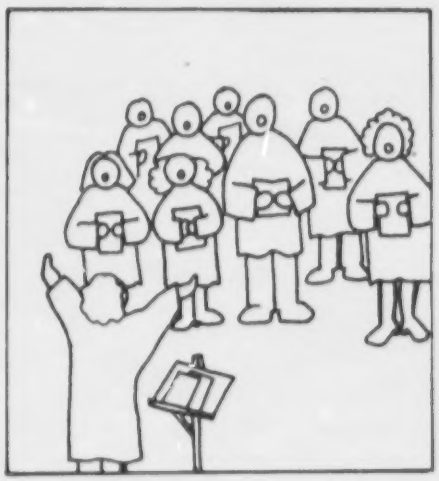
It's important to consider whether this is the most effective way to achieve the learning objectives. Success will require some form of friendly and supportive response and assistance. If questions or problems are complex, a problem set might more properly be labeled "discussion questions" or "case studies" or "problem-solving situations."

In-basket exercises: Variation on the problem set. An individual or team receives an in-basket full of problems and tries to resolve as many as possible. The problems could be in the formats typical to an in-basket: memos, letters, telephone messages, fliers, etc. Instructions at the beginning of the exercise would indicate what type of response was desired: drafts of response letters, notes about what you would say in a phone call, etc. Discussion afterward could include a comparison of responses, of the order in which items were dealt with, etc.

Learning stations: Directions for physical tasks, problems to solve, or any other activity could be posted at different locations in a large room. Participants would proceed in random or specified sequence to the various stations and perform the tasks indicated. Leaders or facilitators would float from station to station, assisting anyone who needed help.

Apprenticeships: One important aspect of apprenticeship is the opportunity to practice skills and receive advice and coaching from an experienced person. Probably the most common use of apprenticeship in citizen groups is the early election of officers so that they can apprentice with the outgoing officers for a time before taking over, thus acquiring skills in running meetings, keeping financial records, etc. Apprenticeship also involves demonstration/observation, discussion, problem-solving, and other learning methods.

Drill and coaching: This form of skill-practice is one that seems more appropriate for the athlete, musician, or actor than the citizen group member. There are few citizen group skills, if any, that require repetitive drill. On the other hand, frequent and friendly coaching, in and out of designated training periods, is a very healthy contribution of the overall learning climate.



Group 3: Process-Knowledge Methods

Recommended for: how-to knowledge

Often the training which citizen groups need most is a working familiarity with **processes** which can help them function more effectively: how to define goals, analyze social problems, decide on action plans, develop a timeline, write a funding proposal, set up a new citizen organization, lobby for a bill, conduct a petition drive, prepare a public service announcement, and so on. So-called experts often owe their status and high salaries as much to the processes they are familiar with as to the specialized information they command.

Frequently, process knowledge can be "captured" on paper, in the form of step-by-step instructions, checklists, worksheets, and planning guides. A cookbook, for example, is a collection of process knowledge in step-by-step form. The cookbook user needs to develop some judgment (in order to season "to taste"), but even the novice cook can go a long way by following directions.

Likewise for the citizen activist. You may be able to find, in the CITP manuals or elsewhere, a cookbook approach to the task you face—a recipe for action, for which you must provide the ingredients. Hopefully, such a recipe will help your group achieve its immediate goals, but you will also acquire familiarity with the process so that you can use it again, or modify it to suit your situation.

In order to get the maximum learning from a process-knowledge method, it is important to discuss the usefulness or appropriateness of the process immediately after its use. Sometimes a group will resent the imposition of a structure; more often, the members will enjoy the sense of progress and cooperation which can result from agreeing to work together within the framework of a specified process. Proposed modifications should be noted so that the group can quickly activate a process in the future when appropriate.

If you aren't aware of an existing recipe for the process you face, it may be possible to develop your own. Among the more experienced members of your group there exists a great deal of how-to knowledge. They may be able to write some of it down in step-by-step fashion, or you may be able to obtain it by interview or observation. All that's required is a thoughtful, systematic approach, plus a willingness to compare the recipe that you are writing down with the actual process as it has worked in the past, to see whether you have it all down.

Step-by-step instructions: This is the classic cookbook format; specific steps or tasks are identified and presented in sequence. They may be numbered; if the process is complex there may be substeps.

Checklists: A variation on step-by-step instructions. Some checklists specify a task or step. Others specify targets or accomplishments which will result; the task is implied.

Worksheets and planning guides: By presenting a series of thought-provoking questions, information-gathering steps, and other suggestions for planning, perhaps in a questionnaire format which provides space for answers, these tools capture some sorts of processes even better than a recipe could.

Questionnaire formats, especially, can record a progression of analysis and planning which allows for comparison of different members' ideas and review of the thinking at a future time. See the notes on "Process-Knowledge Methods in the CITP Manuals" for examples.

Demonstrations: Some processes or skills are difficult to describe orally or in writing. In order to learn to be an effective surgeon, or counselor, or learning facilitator, it is helpful to be able to observe an experienced person performing these roles. Thus demonstrations or role **modeling** are useful ways to learn certain processes. They should be followed by discussion and by opportunities for the learners to practice the process they have just observed. (Such practice sessions are easier to arrange for counselors or learning facilitators or citizen group members than for surgeons.)

PROCESS-KNOWLEDGE METHODS IN THE CITP MANUALS

Because how-to information is one of the most important needs of citizen group members, process-knowledge methods are perhaps the most common approach in the CITP manuals. The examples listed here illustrate various approaches to the communication of process knowledge.

Topic	Reference	Method
Lobbying	**Playing Their Game Our Way**, pp. 72-73	Planning guide; space to answer questions
Holding officials accountable	**Playing Their Game Our Way**, pp. 109-113	Worksheet
Program planning process	**Planning, for a Change**, p. 15	Step-by-step process in flow chart form; sub-steps are explained in detail in later activities
Problem solving process	**Planning, for a Change**, p. 16	Step-by-step process; model of a general-purpose methodology, with many possible ways to carry out each step
Force-Field Analysis	**Planning, for a Change**, pp. 32-35	Step-by-step instructions, with example
Refining a statement of goals	**Planning, for a Change**, pp. 41-43	Checklist and worksheet
Fund-raising Process	**The Rich Get Richer . . .** p. 8	Step-by-step process model; detailed sub-steps are presented later in the manual
Setting up a new citizen organization	**How to Make Citizen Involvment Work**, pp. 59-66	Planning guide (questionnaire format)

Group 4: Simulation Techniques

Recommended for: process knowledge, skills, integration and understanding of complex knowledge, motivation

These are techniques which bring some of the excitement of the theater into the training experience. Because they are complex, rich experiences, they allow participants to achieve more than one learning objective at once. There are several types:

Role-plays: Brief enactments of two or more key parts (roles), usually representing a real or typical situation that a group may find itself in. CITP's manual on fund-raising ("The Rich Get Richer and the Poor Write Proposals") uses role-plays to help citizens rehearse for a phone call or face-to-face interview with a foundation representative.

Role plays usually focus on critical incidents of some sort: recurring situations which have caused difficulty in the past, or future situations which are foreseen as being crucial to the success of the organization. Thus they serve as dress rehearsals, in a safe and supportive environment, for scenes which will later be carried out under more difficult circumstances.

A role reversal is a variation on the role play idea which calls on two or more people to exchange roles, to walk in the other's moccasins. This usually means that each participant is acting out another's real role (not a fictional role). Role reversal is, therefore, a technique for creating understanding or resolving conflict among people who are willing to meet together and participate in this way. It can be used within a group to help a couple of the members to understand their differences, or between citizens and decision makers if the parties are willing.

If there is thoughtful discussion afterwards, these techniques can help a group to distinguish personality problems from communications problems or from the limitations imposed on people by their jobs or roles. However, it is important to also identify those problems which are based in the broader structure of an organization or a system (such as a social service delivery system) rather than assuming that all problems arise from a failure to communicate.

SIMULATION TECHNIQUES IN THE CITP MANUALS

Simulation techniques can help a citizen group prepare for situations involving conflict, tension or the need to think on your feet. That is what many of these examples do:

Topic	Reference	Method
Lobbying and Accountability	**Playing Their Game Our Way**, p. 60	Problem scenario; role-play with five distinct roles
Lobbying	**Playing Their Game Our Way**, p. 90	Role-play—one team of participants lobbies on each side of an issue
Holding officials accountable	**Playing Their Game Our Way**, p. 107-108	Detailed scenario and description of five scenes provide basis for a complex scenario; leader or participants can select which roles will be filled
Initial phone contact with funding source	**The Rich Get Richer . .** pp. 40-41	Role-play
Interview with funding source	**The Rich Get Richer . .** pp. 62-67	Role-play. Note the discussion questions, p. 68
Community organizing (winning local support for an issue)	**Power: A Repossession Manual**, pp. 109-114	Simulation: complex interaction with many roles. Note that two different scenarios present two different issues, using the same roles and procedures; many simulation techniques can be adapted in this fashion
Group process problems	**Working Together**, pp. 96-98	This role play specifies individual roles; in fact, it asks participants to enact **problems** in group dynamics. Some participants serve as observers. Discussion period combines serious analysis and general laughter

Problem scenarios: Problem situations can be presented for group discussion in such a way that participants play the roles of members of another group. For example:

> XYZ Day Care just got word of cutbacks in support from the Department of Welfare. It therefore needs $500 to meet next week's payroll. Suppose that you are members of the Parent Advisory Council; what would you recommend?

Such an activity is really a hybrid: a mixture of methods from the different groups. It is similar to the problem set of Group 2, the problem solving activities of Group 7, and the case studies of Group 6.

Some simulations use computers to provide revised information for successive rounds, based in part on participant decisions. Some combine human interaction with board game play or use props such as money, chance cards, instruction cards, etc. However, many successful simulations use simpler special effects, perhaps adding realism through such touches as news bulletins or telegrams.

Simulation games: More extended than role plays, simulation games involve numerous roles and rules or a sequence of steps which simulate a real or fictional social situation. CITP's manual on community organizing uses a fictional situation about a runaway shop (a factory moving to another state or country where labor is cheaper) as the basis of a simulation about gathering community support for City Council action on the issue.

CREATING A ROLE-PLAY

It's not difficult to develop a role-play or simulation which will be very helpful to your citizen group. First, study the way other trainers have used simulation techniques; see the box title "Simulation Techniques in the CITP Manuals." Then follow these steps:

1: Identify the issue or situation you want to deal with and the learning objective you wish to attain. If you start with an issue, try to identify the interaction—the dramatic situation—which will most effectively capture the conflict or tension in the issue.

2: Decide whether the role-play will use a known, familiar setting (the citizen group or the local community, for example) or an unfamiliar one. If the situation will be unfamiliar (or fictional), develop a scenario—a description in words of the context. Give enough detail so that the situation seems realistic; include a description of the problem, something about the parties involved and perhaps some touches of local color.

3: Decide what the roles will be; determine whether participants will be playing themselves (members of your real citizen group or residents of their real community), or whether they will have general titles (mayor, corporation president, foundation officer), or whether they will have detailed role descriptions. Write any role descriptions called for, including one or more of the following details:

- the person's position or job title.
- the person's background, including social or economic status.
- the person's position on the issue in question, possibly including suggested statements that the person might make.
- the person's personality traits, habits or mannerisms.
- the person's relation to others in the role play.

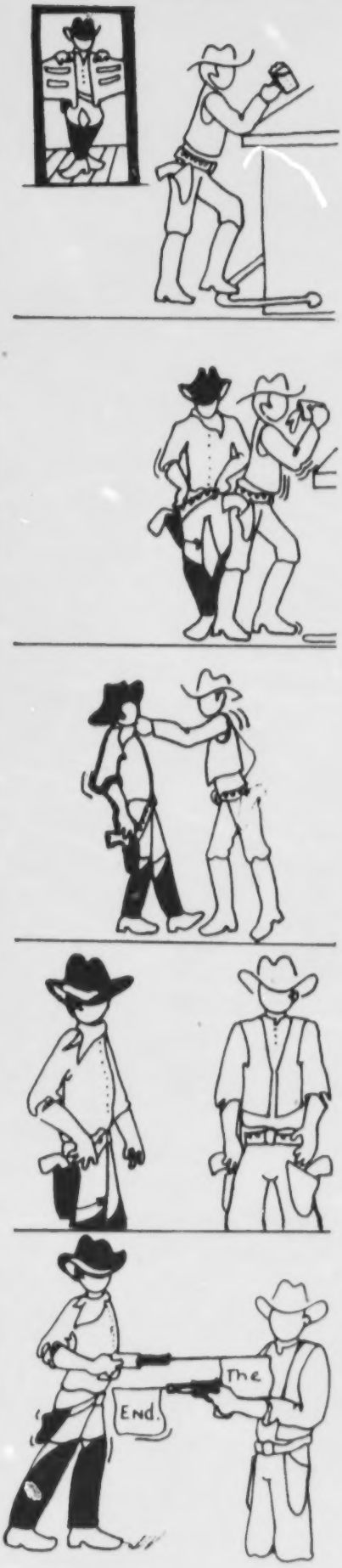
Write these role descriptions on cards which can be handed to each designated actor. (If people are playing themselves or are being given only a title, then cards will not be necessary.) Decide what information participants will be given about each others' roles at the onset, if any, and either write this down or prepare to present it orally.

4: Identify the dramatic situation—the action—which will help the group to deal with the issue (rehearse the skill, understand the conflict, etc.). Decide what the setting will be in which this action can take place (a meeting room, front door of a house, office, etc.) and describe it in writing. Decide what will start the action—some event, a word from you, an instruction in the chairperson's role description, etc. Add the necessary information to the general description, role card or your own notes.

5: Decide on any touches of realism which you may want to add, such as news bulletins, telegrams, or props. If all goes well with your role-play these may be no more than amusing, but if the role-players have a hard time staying in character, these touches can reming them of what they're supposed to do.

6: Plan follow-up discussion questions which will help group members to review and consolidate what they have learned. Two especially useful topics for questions are **feelings** which the various participants had in carrying out their roles (often surprisingly intense and, more important, realistic) and **judgments** or decisions which participants made and the thinking upon which they were based.

7: Review your plan (and have someone else check it over with you) to see whether the descriptions and instructions are complete and adequate, whether the situation is plausible and whether the activity addresses the issue and the learning objective around which it was designed.



Group 5: Process Observation Methods

Recommended for: understanding/sensitivity to group process and interpersonal dynamics; process knowledge

A major training area for citizen groups (or any other type of organization) is group process. Almost every group has room for improvement in listening skills, effective communication and teamwork. Almost every group can do better at providing individuals the support, encouragement and assistance they need for full participation, or developing leaders who can bring out the skills, energy and cooperation of the group.

Process observation lays the groundwork for such improvements. It provides a diagnosis of what the group does well and where improvement is needed most. Based on the process observation methods described below, group members may decide to use some other training methods to make the changes they seek in group behavior (see the box titles "Methods for Improving Group Process"). However, process observation is an important skill in itself and it will often lead to spontaneous changes once people are "sensitized" to the interpersonal dimension. When people are made aware of the consequences of their personal styles—their listening and speaking, their friendliness and "taskiness," their cooperation or competitiveness—they will often modify their behavior in the interest of group effectiveness.[1]

1. Process observation can be distinguished from "process knowledge," presented above as Group 3. Process knowledge has to do with step-by-step procedures for achieving a specified purpose (raising funds, holding officials accountable, etc); process observation emphasizes the interpersonal dimension of the group's existence. The two types of methods do have some overlap: **guided observation** of task-oriented behavior (Group 5) and **diagnostic questionnaires** about process-knowledge performance (Group 3) are very similar, but Group 5 stresses individual roles (presenting information, summarizing, checking for agreement) whereas Group 3 stresses performance of specific steps or an overall procedure by the group (uses program-planning processes, uses timelining, etc.).

In general, process observation techniques (Group 5) are broad-based and can be applied to many different topics, whereas process-knowledge methods (Group 3) are procedures which apply to a specific need.

PROCESS OBSERVATION METHODS IN THE CITP MANUALS

These methods are illustrated primarily in CITP's manual on group process, **Working Together: A Manual for Helping Groups Work More Effectively**. There are a couple examples from the other manuals as well.

Topic	Reference	Method
Maintenance and task actions of individuals	**Working Together**, pp. 87-93	Fishbowl with option of real or hypothetical task for the "fish." Observers use one of two rating sheets, focusing on either the task-oriented or group-maintenance behavior of participants
Facilitator skills	**Working Together**, pp. 22-25	Group members rate the performance of several facilitators during the course of a real meeting
Meeting Observation	**Working Together**, pp. 81-83	Open-ended observation guide for recording **who** did **what** with **what effect**
Analysis of an effective support system	**Planning, for a Change**, p. 72	Participants identify a time when they had the personal support they needed to be effective (different situations for different individuals) and answer questions about that situation. Discussion
Non-helpful roles	**Working Together**, pp. 96-98	Fishbowl; half the group role-plays a hypothetical problem-solving situation in which each exhibits behavior which is not helpful to the group effort. Observers try to identify the various behaviors
Overall group progress, "building" and "blocking"	**Working Together**, pp. 84-85	Stop-action; leader stops the meeting at four points; all participants rate the group on 12 criteria; discussion at end of meeting

A process observation is generally more effective if it is guided by some type of checklist or rating sheet which provides a structure for one or more participants to observe some aspect of a group's process, such as leadership behavior, communicating and listening, etc. See "Process Observation Methods in the CITP Manuals" for examples.

Observations could be directed at a group meeting, a training session or an artificial situation created for the purpose (a role play; often, the observations of the role play apply to the same people in real situations). The methods which follow present options for guided (or unguided) observation. In all of these methods, there are two objectives: generating information about the group's behavior and developing skill in process observation. Because the skill of observation is so important, every group member should have an opportunity to do guided observation at least once.

Fishbowl: Two or more participants carry out a real or artificial task while the remainder of the group sits in a ring of chairs around them and observes. (The name of this method derives from the similarity with observing fish in a fishbowl.) Observers might use a checklist or other guided observation tool. A discussion is held afterwards, and would focus on the observations, the experience and feelings of the "fish" (especially to get their perspective on the specific events commented on by the observers) and also possible improvements which could be made in the process. Then the "fish" might try out these suggestions, or they might exchange places with some (or all) of the observers, for a second round of observation.

Process observers: One or more group members could be asked to serve as process observers during a meeting or training session. They might use a checklist, rating sheet, or other guided observation tool. They would share their observations and recommendations at the end of the session, at a predesignated midpoint or whenever they thought it would be helpful. The group might wish to discuss the observers' input, or might want to continue but with a commitment to resolving any problems.

Some groups consider the process observer technique to be so valuable that they make it a permanent part of their meeting plan, always designating a process observer just as they would designate a chairperson or secretary. The method provides a way to integrate training (regarding group process) with the ongoing life of the group.

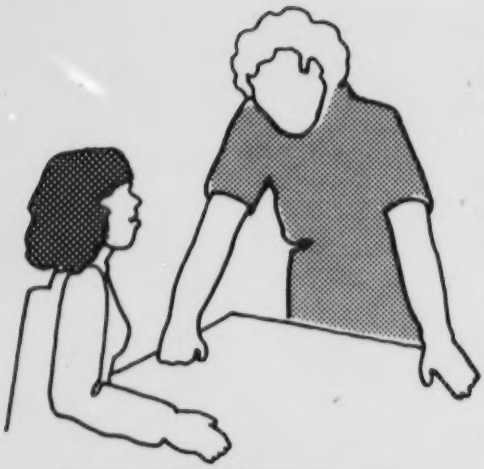
Stop-action: During a meeting or training session, the leader asks all members to stop what they're doing to rate and/or discuss the group's process up to that point. This could happen at a predesignated time or at any point when things seemed confused or bogged down. If a stop-action is used in a real meeting when there is some difficulty in group process, then problem solving methods (Group 7) could be used to identify possible changes.

A stop-process evaluation is proposed in Chapter 13 as a way to evaluate a training session. This is very similar to the stop-action method for the group process observation, except that the stop-process method of Chapter 13 asks participants to assess their activity in terms of learning objectives rather than group process.

METHODS FOR IMPROVING GROUP PROCESS

As we stated earlier, a major purpose of process-observation methods is to develop in participants the skill of group process observation and a sensitivity to this dimension of group functioning. However, almost any process observation will turn up problems which invite some form of additional action. Many possibilities can be identified from among the six other groups of training methods presented in this inventory. Here are some examples:

Group	Methods	Example from the CITP Manuals
1	Short readings; mini-lecture	**Working Together** contains many short sections on improving group process. These could be duplicated and presented as short readings, or converted into mini-lectures.
2	Skill practice drill with coaching	The guided observation forms in **Working Together** provide the basis for coaching on almost any group process skill for which improvement is needed.
3	Step-by-step instructions	Most group process skills can be stated in step-by-form. **Working Together** does this on pages 13-17 with the process of introducing participants to each other and getting a meeting started—activities which can contribute to the members' sense of interpersonal support and mutual concern.
3	Demonstrations (including role modeling)	The training coordinator or other group members can demonstrate effective behaviors. For example, a trainer who follows the "Helpful Hints for a Facilitator Using This Manual" (**Working Together**, pp. 26-27) will convey much more than any lecture could about that style of group leadership.
4	Role play	Problems identified in real meetings with real group issues might be seen and worked on more clearly in the context of a fictional problem. The training coordinator or another group member could design an appropriate activity, using the fishbowl/role plays in **Working Together** (pp. 86-101) as models.
6	Discussion	An essential part of any process observation. Will often lead into problem-solving.
7	Problem-solving	Problem-solving techniques such as problem redefinition, brainstorming and opportunity analysis are presented in **Planning for a Change** (pp. 44-54). There, the emphasis is on developing the content of a group's program; however, these same methods could be used to develop solutions to problems of group process.



Group 6: Discussion Methods

Recommended for: sharing reactions to a learning experience, summarizing and consolidating all types of learning, comparing judgments or opinions, enhancing understanding

Discussion is a vital component of any learning activity. It can be used as a follow-up to any of the other training methods described in this chapter, or as a means of comprehending recent events that have taken place in the life of a citizen group. It is especially important when there have been the sort of complex learning activities we have recommended (or complex real-world experiences) which are subject to different individual interpretations; it is very constructive to see how other members have interpreted the same experience and what they have learned from it.

One of the most difficult but important abilities to acquire is the ability to make sound judgments. Discussion provides an opportunity to make judgments and to compare them with others' judgments about the same issue. If rationales can be stated and heard in a friendly and respectful climate, there is the opportunity for an entire organization—old and new members alike—to begin to make better decisions and, if appropriate, to move the group's programming into new and productive areas. Discussions that take this orientation may verge into problem-solving sessions, using some of the techniques listed in Group 7.

Discussions can stand on their own as learning experiences. For example, they are the primary method used in the consciousness-raising groups of the men's and women's liberation movements. A citizen group might choose to hold open-ended discussions with the broad purpose of exploring members' values, concerns and interests.

Discussions can be guided or unguided. Guided discussions are those which have some focal point, such as a set of questions, a list of options, a reading or a recent event; often, they also have a leader or facilitator. Unguided discussions usually have a broad topic but no specific focal point and perhaps no leader. This type takes longer to get underway, but may have an advantage in providing all participants a chance to raise the concerns that are most important to them. Either type of discussion can bog down in a chaos of axe-grinding, squeaky wheels, chest-beating, etc. Good leadership and a shared focal point can minimize these difficulties.

Discussion questions: This is the most common form of focus for a discussion. The CITP manuals have abundant examples of the sorts of discussion questions we consider important. Likely areas for questioning include:

- individual feelings and interpretations of an experience.
- understandings or opinions about the root causes of social problems.
- judgments about the most appropriate actions or stategies to acheive a goal.
- personal priorities, values, concerns and preferences.

The facilitator's most important job in a discussion is to make sure everyone is encouraged (but not forced) to participate. It may be helpful to set some guidelines ("Everyone will have the opportunity to speak once before anyone speaks twice.") in order to counter the tendency of a few people to monopolize discussion. The facilitator may also need to hold people to the

agreed upon question, rephrase it if it is not being understood, or encourage people to plunge into the hard core of a discussion rather than "talking around the subject."

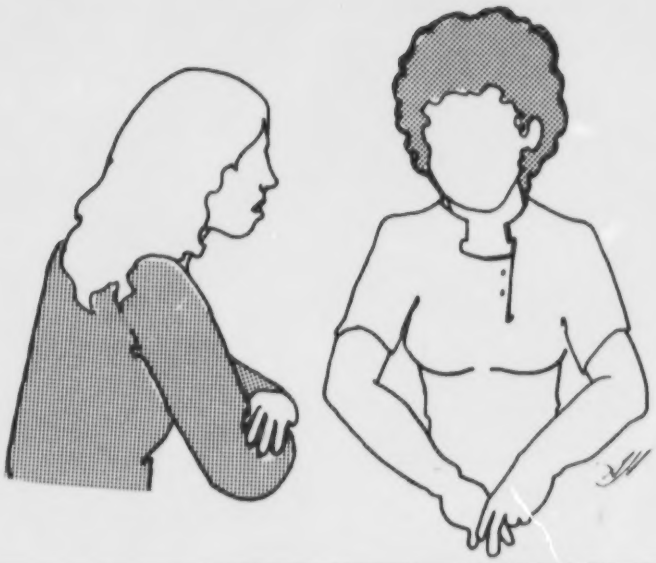
A newsprint record of the various opinions expressed may be helpful; see Chapter 14 for ideas on this. The facilitator may need to help the group summarize its discussion and may want to encourage members to suggest implications for the future.

Case studies: A case study is a brief description of a situation, real or hypothetical, which may be followed by discussion questions, a decision-making situation based on the case information, or additional cases for comparison purposes.

Case studies provide a method for exploring alternative strategies or solutions to problems; they create a backdrop for making and comparing judgments. Among the CITP manuals, **Power: A Repossession Manual** provides the most interesting illustration of the case study method. It uses case studies to illustrate the differences among several major approaches to organizing; this "illustrated comparison" is carried on throughout the manual. A citizen group can add its own situation to the "textbook" cases and can consider where it stands in relation to the six basic approaches to organizing.

Option lists: One productive focal point for a discussion is a list of choices or options: possible reasons for a situation or event, possible actions that a group could take in the future, different strategies for getting a bill passed or saving a historic site or raising money or recruiting new members. For any of these concerns, a list of possible choices presented to the group for discussion can quickly move the group through an impasse to a new sense of progress.

Of course the success of this technique depends on the timeliness of the topic and cleverness of the choices. An option list should always be left open-ended ("Other: _____" can be the last item on the list). If the group gets involved in generating options, you have a brainstorm, one of the problem-solving methods (Group 7).



DISCUSSION METHODS IN THE CITP MANUALS

Discussion questions in the CITP manuals are too frequent to list. The table below contains examples of case studies and option lists.

Topic	Reference	Comment
Relation between group structure and the power a group can develop	**Power: A Repossession Manual**, pp. 57-60	Case study of one group's experiment with democratic, decentralized decision-making
Action strategies	**Power: A Repossession Manual**, pp. 79-80	Case study: a comparison of four unusual and successful action strategies
Analysis of root causes	**Planning, for a Change**, pp. 29-30	Case study: one group's successful use of an extended analysis period as a basis for planning an innovative program
Working with the media	**We Interrupt This Program . . .**, pp. 37-44	Case study: one group's successful coordination with regional and national news media to ensure full and accurate coverage of a major demonstration
Types of media coverage	**We Interrupt This Program . . .**, pp. 17-19	Option list: presents 18 different media channels with advantages and disadvantages
Motivation for participation	**Working Together**, pp. 30-33	Option list: exercise uses checklist of 23 typical reasons for involvement (open-ended) as basis for discussion
Information-gathering techniques	**Power: A Repossession Manual**, pp. 34-35	Option list: compares four different approaches: knocking on doors, needs survey, public hearings and community resources manual
Ways to prioritize problems	**Power: A Repossession Manual**, p. 44	Option list: compares voting, group discussion and team building
Mechanisms for effective citizen involvement	**How to Make Citizen Involvement Work**	Option lists: 11 broad visions (pp. 44-47), 68 specific mechanisms (pp. 25-43) and 80 strategies for enhancing a group's influence (pp. 77-80)

QUICK DISCUSSION TECHNIQUES

Many opportunities for discussion are lost because the leader of a meeting or training session assumes that there isn't time for it or that the number of people present will prohibit meaningful discussion. Large group meetings with apparently too much important business to allow for discussion are probably the settings in which time to react is most urgently needed. Here are some techniques which can work:

Turn to One of the People Next to You

A thousand people in a crowded assembly hall can hold a useful discussion in two to four minutes. That many people usually come together to hear the thoughts of a celebrity or to witness an audio-visual presentation. They are probably engaged in passive learning, and they need a discussion period. But the usual question-and-answer period gives "air time" to only a few, and you know what happens to the questioner who starts explaining her own thoughts instead of posing a question. So try this (it works in small groups too):

"I'd like everyone to pair up with one of the people next to you. Try not to leave any stray individuals stranded in the middle of a row. You'll have two minutes apiece to share your thoughts about what has been said so far, and I've written two questions up here to help you focus your discussion:

> 'What do you think is the most important idea that's been expressed?
> What do you think our organization should do about it?'

While the first person talks, the second person should **just listen.** Your good attention and eye contact will do more than words to help the talkers clarify their ideas. I'll call 'Switch' at 2 minutes and 'Time's Up' at four minutes."

The purpose of keeping time and switching roles is to make sure the time doesn't go by with only one member of the pair getting to speak. There are some variations on the technique which create more of a dialogue:

Variation 1: Do not identify talkers and listeners; allow for a real discussion in the pairs. However, you can say after two minutes:

> "Half of the time has gone. Make sure both members of your pair are getting time to express their thoughts."

Variation 2: Combine the previous two approaches. Spend one minute apiece answering the questions while the other listens; spend two more minutes discussing your ideas together.

One-Liners

This technique is designed for the same situation, but it accomplishes a different result. The leader of a large session might say:

> "You've been listening for the last 15 minutes, and I appreciate your patience. Before we decide where we go from here, let's find out what sort of thoughts are on your minds. Could we have anyone who wants to speak, but limit yourself to one sentence?"

The result is that everyone knows "where the others are at" (rather than what one individual has been thinking). The one-sentence limit may seem like an imposition, but the advantage is that it prevents the "tyranny of the talkers"; everyone gets a chance before the wordy types can let loose. If there's a need for a more extended discussion, it can happen next.

Other Ideas

There are many other ways to provide active participation and a sharing of ideas under a tight time-schedule. Here are a few:

1. Conduct a survey. A quick show of hands will clarify group opinion about support for the ideas proposed, what to do next, etc.

2. Establish core groups. In a large conference or even a one-day workshop, a small group (say, five to ten people) can establish a rapport, a style of working together and a sense of safety and trust which allow for efficient sharing of reactions. These groups would meet periodically throughout the program to share their thoughts and feelings.

3. Select discussion questions carefully. They need to be precise enough to help focus the discussion, yet open-ended, if possible, so that participants don't feel trapped or constrained by them.

4. Identify discussion leaders who can help small groups focus their discussion. If they are inexperienced at leading discussion without dominating or manipulating, give them some training beforehand.

The main point is to allow enough time for discussion. Often they are the activities which provide the crucial link between new ideas or skills and the application in the group's ongoing activities. Don't cut them short if you can help it.

Group 7: Problem-Solving Methods

Recommended for: development of individual and group problem-solving skills which can be applied in a wide variety of situations

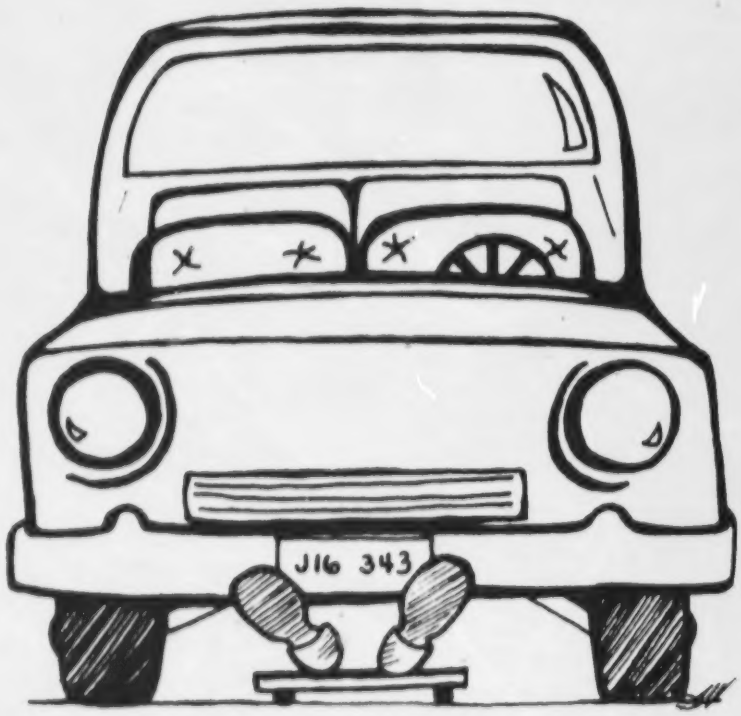
Citizen group learning is at its best, we believe, when it is on-the-job training—not distinct from the group's ongoing efforts to reach its goals. One of the best methods for combining learning with immediate progress is to take a problem-solving approach in the training sessions.

The group identifies problem situations which it faces and chooses one to work on. As individuals, small teams, or the entire organization, participants direct their attention to various steps in the problem solving process: analysis of the situation, problem redefinition, goal setting/values clarification, exploration of alternatives, decision-making, and implementation.

There are specific techniques which a group can use to develop solutions to problems.

There are specific techniques for addressing each of these steps; some of them are found in CITP's manual, **Planning, for a Change**. A more extensive collection of group problem-solving techniques can be found in the book **The Universal Traveler** by Don Koberg and Jim Bagnall.

The facilitator's role in group problem solving or creative thinking activities is to present clear instructions for the methods chosen, to help members understand and perform their tasks, to check whether the chosen methods are proving useful, to help the group select other methods if necessary, and most important to stimulate the sort of discussion which allows participants to assess their progress and decide whether the same technique should be applied in similar future situations.



PROBLEM-SOLVING METHODS IN THE CITP MANUALS

CITP's manual on planning and program development, **Planning, for a Change**, presents several of the most useful techniques for problem solving and creative thinking. Although they are presented in that manual as techniques for developing creative new ideas for citizen group programs or action strategies, they can be used to address a wide variety of problems.

Topic	Reference	Comment
Problem redefinition	**Planning, for a Change**, pp. 48-49	Creative solutions are based on new ways of understanding the problem situation. Two approaches to problem redefinition are presented.
Generating options	pp. 44-45	Brainstorming
	p. 50	Opportunity analysis
Elaborating on options	p. 47	Exploring options
	p. 52	Developing a program idea
	p. 54	Contingency planning
Rating desirability	p. 57	Goal fulfillment
	p. 61	Pros and cons
	p. 62	Feasibility
	p. 63	"Zap analysis"

THE BRAINSTORM

Since brainstorming is probably the most widely used and abused technique for problem-solving, we reprint here the introduction to brainstorming which appeared in **Planning, for a Change** with additional suggestions for its successful use.

Examples: Sometimes fictional situations are used to introduce a group to brainstorming, and the topics may be amusing to stimulate a playful and creative orientation:

- Things you could do with a crate of empty Coca-Cola bottles if you were stranded on a small desert island.
- Features of a bathroom of the future.
- Ways to get a message to your cousin in Kalamazoo, without using the mail or the telephone.

If a group has never used brainstorming, you could start with one of those as an introduction, or you could jump right into the real issue that concerns the group at the moment.

When to use it: There are a lot of possible applications:

- When you want to get some ideas for possible solutions to a problem.
  - Ex.: How could we publicize our coming Community Fair?
  - Ex.: What can be done about rising rents and deteriorating housing in our neighborhood?
- When you want to get ideas about how the group should spend its time.
  - Ex.: Which training needs should we address at the next workshop?
  - Ex.: Which community problems should we try to deal with during the next year?
- When you want to identify people or organizations that could be helpful to your group.
  - Ex:: Who could we call on to support our campaign for a community health clinic?

How to use it: Brainstorming usually starts as an inventory or listing of old, familiar ideas. (There is a lot of popular wis-

Guidelines for Brainstorming

Brainstorming is one method which can help a group of people get involved together in the process of generating creative ideas. A facilitator writes the topic or question to be brainstormed at the top of a large sheet of paper, then asks the group to call out their ideas in short phrases which can be written down quickly. In order to set a creative, high energy tone, the following guidelines should be stated to the group from the onset:

- No judgements. No idea or suggestion, no matter how wild, is to be shot down, or edited. (There'll be time to evaluate the ideas later.)
- Anything goes. Offbeat, unusual, humorous and bizarre ideas are encouraged.
- Go for *quantity*. The more ideas, the better the chance of coming up with a winner.
- Building on other people's ideas is fine.

The facilitator of the brainstorm can help to keep things moving, if necessary, by: 1. Setting a time limit--commonly 3 to 10 minutes (depending on topic and size of group), so that people will know they can't afford to sit on an idea; 2. giving a few examples to start things off (a "nailstorm"); 3. praising, coaxing (gently); 4. asking for different *sorts* of examples if the group starts to develop a "one track mind."

The conventional approach is to have one person record the group's ideas on newsprint with a felt marker, so that all can see. Sometimes two recorders work as a team, writing alternate items, so that the group won't have to wait for the recorders to catch up.

Another variation that is especially useful if you have several topics to brainstorm is to write each topic on a separate sheet of newsprint paper, and provide each participant with a marker so they can go up to the lists and record items "grafitti-style."

Recent research indicates that brainstorming is *not necessarily* the best technique to generate lots of creative ideas. The problem seems to be that a group of people can go off on one tangent without exploring the full range of possibilities. This suggests several **variations** of the brainstorming process:

Variation 1: Instruct each group member to brainstorm *individually* on the topic, writing down ideas on a small piece of paper. Then share the ideas by reading off the lists (or compiling the lists later).

Variation 2: Divide the group into two or more teams, each to brainstorm on the same topic. This "parallel groups" approach has some of the advantage of Variation 1, plus the sense of group cooperation which is an important side effect of brainstorming.

Despite its limitations, brainstorming remains a popular technique. For many groups, it has provided a first clear picture of their potential to think creatively together and to move off in new directions. It also lets everyone know where the ideas have come from, thus setting the stage for consensus and action.

From **Planning, for a Change**, by Duane Dale and Nancy Mitiguy, © 1978 University of Massachusetts (Citizen Involvement Training Project), pp. 44-45.

dom about how to deal with social problems.) It is at its best when the group starts adapting or combining old solutions into creative new ones. The facilitator can encourage the group to do that.

Brainstorming is commonly seen as a technique for creative thinking in a group setting. That's correct, but it's far from the only technique that can be used. An excellent sourcebook for other problem-solving, creative thinking techniques is **The Universal Traveler** by Don Koberg and Jim Bagnall (see "Tools" section at the end of this manual).

Brainstorming is often more productive if it has been preceded by an analysis of some sort—a discussion or exercise which allows people to share their interpretations of the problem: its root causes, the barriers to change, the specifics of the present situation, a vision of the ideal situation, the parts of the problem, and perhaps an inventory of the resources available to help solve the problem. (See also "Problem Redefinition" and "Problem Possibility Areas" in **Planning, for a Change**, pp. 48-50.)

Since brainstorming is an expansive, divergent thinking approach with generates lots of ideas, it needs to be followed by a narrowing, focusing activity which extracts a reasonable number of promising ideas for the group to work with. There may need to be discussion of the practicality and desirability of the different ideas first, but as soon as possible the group will need to make some choices. Here are some possible ways to do that:

- "Three votes each and we'll keep the three items that score highest."
- "Let's try to rate these ideas from 1 to 10 on how well they'll take. Ten is high and 1 is low."
- "There seems to be interest in pursuing the second idea and the fifth. Are there others that we should continue to explore as well?"
- "Can we combine any of these ideas? Can we drop some which are almost identical to others?"

Because the key ingredient in a brainstorm is creativity, the facilitator can help by setting an optimistic and energetic tone. A group which has used brainstorming successfully and has found some new solutions or directions as a result, comes away with greater confidence in its ability to cope with challenging situations.

CONSULTATION

A comfortable, cooperative, and energizing group setting is a very helpful ingredient for good problem solving. Such a setting might be created by a charismatic facilitator standing before the group with newsprint and felt pen or it might involve as few as two people talking quietly together.

By paying attention to this interpersonal dimension of problem-solving, human beings can become much more helpful to each other than we usually are. And a training coordinator can sometimes do as much for a group's problem-solving abilities by helping to set up good problem-solving relationships as by studying and communicating the many specific techniques which are in the problem solver's bag of tricks.

The essential ingredients for a consultation are a problem poser, one or more consultants, and some time. The problem poser poses the problem (say that fast!) and what happens next depends on your approach to consulting.

- A problem solver or expert consultant takes over the problem and goes to work on it. It's like when a harbor pilot takes over from a ship's captain and brings the vessel safely into port. Someone with technical skills or a developed ability to solve problems takes over for a period of time. The immediate problem may get solved, but there is no particular attention to leaving the skills behind.
- A good listener may seem to be the most passive and least helpful kind of consultant. That's not necessarily true. Active listening—attempting to absorb and comprehend all that's said, giving good eye contact and a sense of friendly concern and support—is hard work; it can also be very productive. It provides the problem poser a chance to think out loud and an assurance that there will be no put-downs—but also no running away from the problem—during a specified period of consulting. Since inexperienced consultants are prone to be **too** helpful—giving advice, talking about similar problems they have faced, etc.—it if often a good idea to **require** the consultants to say nothing, and it is often surprising to consultants **and** problem posers how helpful that can be.
- A problem-solving partnership is a common approach to consulting. The consultant doesn't take the helm away from the problem poser, but instead shares in the process of developing solutions. Consultants can bring in fresh ideas, a new perspective on the problem, and new strategies for tackling it. The problem poser is the expert on describing the situation and deciding whether a solution is workable.
- A process consultant refrains from sharing possible solutions and instead suggests strategies or thinking processes which may be helpful. The process consultant may also give detailed suggestions on how to make a particular problem-solving strategy work. It is assumed that the client knows the situation best and can come up with the best solutions himself if given guidance and suggestions on procedures. Brainstorming is one of many techniques that a process consultant might suggest. Some process consultants identify and work with the interpersonal conflicts or tensions that can get in the way of effective problem solving.

CONSULTATION AS TRAINING

If the trainer has decided on a **problem-solving** approach to training, she will probably place herself in the role of process consultant to the participants, who then work on a problem which the group actually faces. But the group members can be consultants to each other. In some cases an individual member will be experiencing a problem more directly than others, and can serve as problem poser. In other cases, one or more members can volunteer to serve as the problem-posing team and others can serve as the consultant team, pretending that they are coming into an organization about which they have no prior knowledge. (Even this fictional amount of objectivity can help create some fresh perspectives.)

The consultant(s) will need to decide which type of consultants they will be. If they are familiar with a variety of problem-solving techniques, they could act as process consultants. If not, they can act as listeners or as problem-solving partners. An initial period as listeners may be the most constructive; it is likely to be the most different from the efforts that have already gone on to solve the problem.

Variation: Group members can work in pairs, several pairs dealing simultaneously with the same problem. After a period of pairwise problem-solving, ideas for a solution can be compared.

Learning outcomes: The benefits of this sort of activity are varied and hard to predict beforehand. New procedures might be invented, new programs planned, and also new partnerships and better teamwork might result.

FINDING VS. CREATING

The foregoing inventory of training methods is intended to be useful whether you plan to find existing activities or create your own. Either approach is defensible. The beginning trainer should try designing activities (or modifying existing ones); on the other hand, the experienced trainer will not want to take the time to design an activity if there's one available which squarely meets the objectives.

Finding an exercise is a matter of scanning the available sources (such as the other CITP manuals or the sources cited in their bibliographies) and also of recalling the activities which you know by first-hand experience. Creating an activity involves identifying a learning objective, selecting from the inventory a general method which seems appropriate, and developing the details in accordance with that method. In most cases it will be useful to look at samples of that type of activity, which is why we have included lists of examples from the CITP manuals. It may be that an adaptation of an existing activity will suit the purpose.

The best training activities aren't necessarily the first ones that come to mind. It's always a good idea to outline several possibilities—either found or created—and to rough them out in enough detail so that you can get a feel for which one will work best. The following activity is intended to help you compare several different actitivities to see which will be best in a given situation.

Exercise:
CHOOSING THE BEST TRAINING ACTIVITIES TO MEET AN OBJECTIVE

number of people: one to many
minimum time: 20 minutes
materials: copy of the form below

If working alone, write your answers on the form. If in a group, discuss each item, try for a consensus and have someone record the group's opinion. You may want to use some sort of voting scheme when filling in the ratings (step 3).

Process:

1. Write the learning objective you wish to achieve. If you have used the exercises in Chapter 7, you may want to continue with one of the objectives you stated there.
2. Try to find or create at least three activities which address the objective. Describe them briefly in the boxes provided. (A, B and C are for identification; they don't indicate a rating.)
3. Rate each activity against the list of criteria. There are several ways to do this: you may want to rate Activity A on all the criteria, then Activity B, then C. A suitable code would be

   \+ for good 0 for neutral · for not good

On the other hand, you might prefer to decide which activity is best according to each criteria and put a check in its column.
4. Tally your ratings: add the +, 0, and · codes as if they were +1, 0 and -1, or if you used checkmarks, add them up. But also, think about which criteria are most important to you and think about the discussion which you probably had as you did the ratings. Then decide which activity seems most promising overall.
5. Consider the discussion questions at the end of the rating sheet.

	A	B	C
On target; will fulfill the objective.			
Compatible with learning style preferences of group.			
Effective; most participants will reach the desired level of competency.			
Efficient; requires a relatively short amount of time in light of the results expected.			
Taps motivation and interest of the group.			
Active learning; participants actually practice the skills or use the knowledge.			
The application of the learning is clear; there is no doubt about the implications for the group's work or the relevance to its goals.			
The learning activity is "rich"; more than one type of objective could be fulfilled by it.			
The activity allows for learning by individuals at different levels of competence and prior experience.			
The method will work at least as well for the group members who need it most, such as those with less experience or formal education.			
The activity is compatible with the group's goals and principles; for example, in a group dedicated to democratic participation, the activity should be compatible with democratic principles.			
Other criteria _____			
TOTALS			

Learning Objective:
Activity A:
Activity B:
Activity C:

Discussion Questions:

- *Is there some combination of the activities which would receive a higher rating than any of the three alone?*
- *Are there any of the criteria for which a bad rating on that one criterion alone would rule out an activity?*
- *How much were your ratings influenced by the specifics of your group's situation? Is your preferred activity likely to rate well in other situations?*

9 TAPPING LOCAL RESOURCES

You don't have to go it alone! That's the message of this chapter. There are sources of assistance within every community that can help a citizen group carry out its training program. The next few pages present suggestions about how to track down these resources and how to make the best use of them.

"Resources" is a badly overused word these days. What it means here is the people, organizations, materials, and money that you might use in your citizen group training. For each of these four areas, you'll find a list of strategies to consider.

We're assuming that a citizen group's training coordinator would either take the role of "resource mobilizer" or recruit **other** group members to track down needed resources. It might turn out that a resource person would become the planner and facilitator of a training workshop, or it might be that the training coordinator would perform these functions. More on the training coordinator's job as resource mobilizer later in this chapter.

PEOPLE

Every community has people with useful information, skills, insights, contacts, judgments. Some are even within the citizen group itself. Many would be willing to contribute their time to help your citizen group become more effective.

How to use them: as sources of information, skills and judgments; as workshop leaders (or co-leaders, in team with the trainer); as consultants to one or a few group members; as planners of training activities; as leaders of an extended workshop series or an open (community-wide) workshop series; as support people for the training coordinator (see Chapter 14).

Where to find them: within the citizen group; among the friends and acquaintances of group members; among community leaders, professors, researchers, professional trainers; allies, supporters of the group.

Many citizen groups will arrive spontaneously at the conclusion that they need outside help: "Let's get someone in here who can tell us how to raise money" (or show us how to set up our accounting system, or help us set better goals and develop new program ideas, or teach us how to lobby at the State House). It's a possibility that always deserves to be kept in mind. In fact, the training coordinator should make it a habit to review this possibility periodically (say, every month) and especially when she's at a loss for ideas to meet a particular training need.

Every group has untapped resources within it, and that's the first place to look for helpers. If the need arises to run a petition drive, there may be someone within the group who's very good at it. That person could step to the front and run the petition drive; he could also gather a team of people who are interested in learning how to run a successful petition drive themselves. In other words, skill sharing could be an integral part of everything the group does.

CITP's manual, **Planning, for a Change**, contains instructions for creating a "Skills Bank" (pages 73-74). The form on page 74 allows each member to identify skills that might be appropriate to teach the entire group. Of course, there are some skills that might be of interest to only a few members, and some that won't seem very interesting until the need for them arises. However, if continual skill sharing can be part of the life of a group, it is liable to make the group more successful and membership more rewarding.

CTOC Newsletter

Bringing in community people as resources for citizen group training is also an underutilized approach. As long as you're not asking for very much time from any one individual, recruiting these people is usually not that hard. The difficult part is getting them to do what you need. It's a matter of briefing them beforehand and working with them while they're present. Give the resource person specific guidelines, preferably in writing. He or she should know such things as:

- exactly why he or she was chosen
- what information, skills, etc. the group is seeking; examples of problems or situations which have indicated the need for training
- whether the session will be lecture (doubtful!), question and answer, role play, case study, etc. —or some combination
- what level of performance the group is seeking, or what project the group needs to be prepared to complete
- how much time is available
- whether a group member will share responsibility for leading the session and, if so, what the division of responsibilities will be
- what previous training activities the group has undertaken and what methods have been most successful

A resource person need not be brought in as a workshop leader or contributor; there are other possible arrangements:

- bring in an experienced trainer or adult educator to help with **planning** the group's training program
- bring in an outsider to provide technical assistance (to set up the accounting system, to run a media campaign, etc.), but make sure several group members are working with the outsider, learning each step of the process

Whoever you bring, and for whatever purpose, make sure the group is getting what it wants. Don't be polite just because someone has been so kind as to donate time, or because an experienced person "must know what they're up to." As training coordinator, you're the one who can read your group's cues of satisfaction or disappointment. If there's any doubt, call for a "Stop-Process Evaluation" (see chapter 12). If the resource person needs to change his style or content, let him know it!

ORGANIZATIONS

Too often citizen groups exist unto themselves, out of touch with other groups that share their concerns. Sometimes this is a matter of not knowing about the other groups; sometimes it's the result of feeling that "we have to get our own house in order first," before approaching other organizations. But there are ways to track down other organizations, and they're going to respect any group that's out to improve its skills and its effectiveness.

How to use them: as sources of success stories (ideas about what works—and what doesn't), as sources of information (to avoid "rediscovering the wheel"), as providers of training (there are a few organizations that offer leadership and community organizer training), as partners in planning and carrying out training workshops, as partners in apprenticeship training or member exchanges (for the purpose of sharing skills from one group to the other).

Where to find them: investigate other citizen groups in the community (issue organizations, neighborhood councils, block clubs, advisory boards, task forces, town boards and committees, etc.); organizations throughout the world which share your focus; human service agencies, religious groups, chambers of commerce; consumer protection boards and consumer rights groups; government agencies, university departments and special programs, Cooperative Extension Services; professional training and consulting firms.

In order to identify groups that may be helpful, try the yellow pages (under social service agencies): the town clerk's office or city manager's office; elected representatives' offices; the League of Women Voters; citizen information services or community resource centers (including walk-in and telephone information-and-referral services); local social service directories; regional and national directories of organizations (such as a national directory of environmental groups); the "Resources" section at the end of this manual.

Contact with other groups can provide a variety of benefits, such as coordinated strategy-planning and collaboration or federation to achieve shared goals. However, the focus here is on collaboration for **training.** What you actually **do** with the other organization depends, of course, on what you want:

- observe their meetings or projects to learn how they go about achieving their goals
- talk with one or a few members to gather information, ideas for strategies, names of contact people, etc.
- plan and carry out a joint training session
- exchange a few members as a way of transmitting skills back and forth

Once a relevant group has been identified, it would also be possible to undertake one of the activities listed under "People," such as bringing in a well-informed member of that group to explain its experiences. One final challenge—don't confine yourself to the groups that agree with you. You may stand to learn the most from those with opposing views—if only by way of learning how the "enemy" thinks or justifies his actions!

MATERIALS

How to use them: as sources of factual information, analyses of social problems, and possible action strategies; as focal points for group discussion; as the basis for community education projects; as the source of a learning plan (some training activities for meeting particular learning objectives; some books and films provide discussion questions).

Where to find them: public libraries, university libraries, CITP's library; in organizations with publications aimed at citizen/volunteer projects (National Center for Voluntary Action and National Information Center on Voluntarism—see "Tools" section at the end of this manual); community resource centers (information and referral agencies); film distributors (including regional libraries). People who can help you identify good, appropriate materials include reference people at libraries, resource/information agency staff, and CITP. Also, see the annotated bibliographies in each of the CITP manuals.

Media aids and print materials can be very useful, but they can lead to problems. TV and films are renowned for their lulling, passive-learning quality. Even if you identify AV materials which are extremely relevant to your training needs, use them sparingly and combine them with active learning such as discussion, role play, or problem solving.

Print materials can create a different problem: group members may launch into reading without a clear sense of what they're after, and will come away with what the author wanted to say, not necessarily what they wanted to know. Also, printed matter is effective for communicating information, but an active component is essential for developing understanding and judgment, and for acquiring skills and process-knowledge.

A wide variety of printed matter and audiovisual materials can contribute to your training effort. Ones that are high in quality and also relevant to your situation are not necessarily easy to find, but they probably do exist. Types include books, instructional manuals, magazines, newspapers, professional and technical journals, government documents, films, videotapes, photographs, slide shows, audio tapes, television and radio programs, learning games and simulations.

Print materials and electronic media programs are especially important in individual learning projects. The training coordinator can help individual group members clarify what resource materials they actually need, and identify truly relevant materials. It may also be appropriate to remind individual learners of the possibility of identifying resource people and organizations which could help them with their individual learning.

MONEY

One of the reasons for writing this manual is to help citizen groups carry on their own training activities using volunteer labor. However, even this book costs something, and there may come a time when free resources won't really do the whole job.

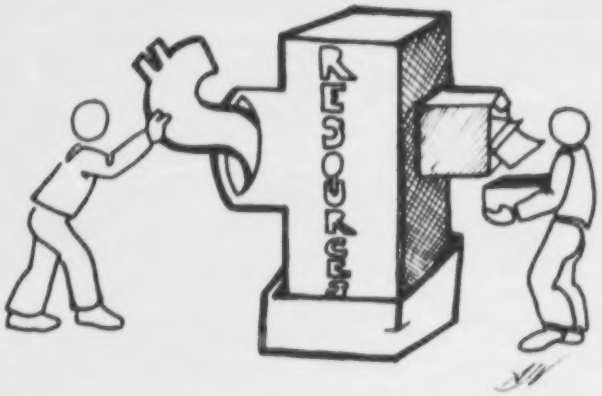
When a citizen group wastes time on a project because the group lacks some skills that are essential to success, that wasted time is worth something. So it may be "penny wise and pound foolish" to avoid spending a few dollars on materials or even hundreds of dollars on trainers when the success of your group is at stake.

How to use it: for resource materials, workshop planners and facilitators, training for the training coordinator or other group leaders (who will bring back training activities and lead them for the group), technical assistants.

Where to find it: dues, state or federal training funds (especially if your citizen group is connected with a government agency), foundation grant (for training exclusively, or as part of a larger project; don't overlook local foundations), donations (from banks, local businesses, clubs, civic and fraternal organizations, or friendly individuals), per-person charge for workshops (could use a sliding scale based on ability to pay), fund-raising events (benefit concerts, bake sales, etc.), and exchange of services.[1]

The last suggestion—exchange of services—needs some explanation. If your organization has a newsletter, it may be possible to exchange a subscription to it for some other printed material that you want. If your organization can perform a service that would be useful to a resource person (stuffing envelopes, conducting a survey, etc.) then you may be able to pay at least part of a fee through barter. (At the least, you may be able to get the minimum fee by handling such things as workshop publicity and duplication of workshop handouts.) If there are other groups in your community that would like to participate in a workshop on community organizing, you might be able to secure a few free admissions to the workshop by handling community-wide arrangements.

It never hurts to ask for free or reduced-rate materials and services. Publishers are less generous these days with complimentary copies, but they can sometimes be obtained if you are planning to review a book in your newsletter. Especially if you are a certified non-profit organization, businesses might be willing to contribute materials. So tap the generosity of your community if you can, but keep in mind that there may be a time when scraping up some bucks is the smartest course of action.



THE TRAINING COORDINATOR AS RESOURCE MOBILIZER

The responsibility for identifying times when resources are needed will fall largely to the training coordinator. Several key questions will guide the decision:

- Are good, relevant resources known to be available or likely to turn up during a reasonable search?
- Will these outside resources produce a better training experience than what we could do without them?
- If there is a dollar cost, can we afford it? Is the resource worth the time and money required to obtain it?

These questions can be raised with the entire group. It makes sense to involve group members in the planning process and, furthermore, they may know of many more resources than the training coordinator alone does. A brainstorming activity such as the following exercise can help to focus the group's thinking.

1 See CITP's fund-raising manual, **The Rich Get Richer and the Poor Write Proposals** by Nancy Mitiguy, for more ideas.

Exercise:
IDENTIFYING POSSIBLE RESOURCES

number of people: one to many
minimum time: 10 minutes
materials required: felt pens, newsprint

Process:

1. Identify a learning need or objective which the group plans to address; write it at the top of the newsprint along with the following headings:

Learning Need or Objective: _____

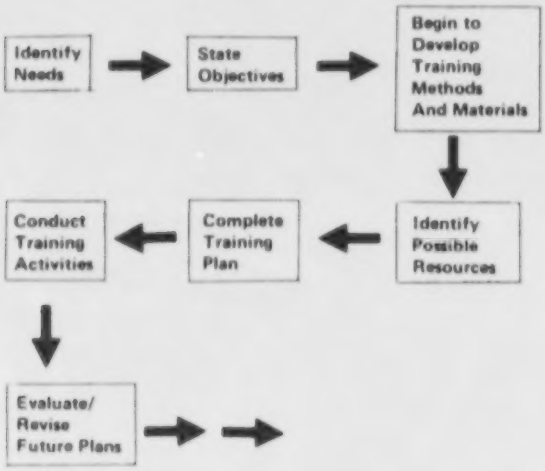
Outside Resources Which Could Help Us Meet the Objective

People	**Organizations**	**Materials**

2. Review the purpose of the brainstorm and explain the three categories (people, organizations, materials) in terms of the suggestions provided earlier in this chapter.
3. Review the guidelines for brainstorming (see page 64).
4. Conduct the brainstorm, one category at a time (or switching back and forth between columns if you prefer). You may be able to use the "Where to find them" suggestions from earlier in this chapter to stimulate additional responses.
5. Hold a discussion based on the brainstorm; try to identify those resources which seem most promising and which generate the most interest among group members.
6. If resources have been selected as appropriate, decide who will be responsible for obtaining them.
7. If a dollar cost is involved, decide how the money will be obtained, set maximum amounts, etc. (This might be done in a more formal business meeting of the citizen group.)

Michael Chan

Ordinarily, the identification of possible resources would occur after learning objectives have been determined, and probably after some initial thinking about how to meet the learning need:



The most frequent mistake in using resources is to turn the program over to the guest speaker, or the film, or the predesigned training session. No matter how good the resource, the training coordinator cannot afford to sit back and enjoy the show. Successful use of resources requires careful thinking before and during the training activity. Here are some points to consider:

- Does this resource (person, training manual, film, etc.) squarely address the training needs of my group?
- If not, how can the resource be modified?
- What discussion questions will help consolidate the learning experience?
- What mixture of my control and the resource person's control will assure a training session that's compatible with the learning style of my group members?
- Does there need to be more **active learning,** more hands-on experience with the procedures or information that the resource is supplying?
- Will the resource work within the time available? Is there enough time to read any printed materials, understand directions, raise clarifying questions, hold discussion, formulate conclusions?

Outside resources can be an efficient and effective way to meet training needs if the training coordinator (and other group members) take an active and thoughtful role. They are not a substitute for locally planned materials and methods. However, they are almost essential as an aid to the novice trainer, and even the experienced trainer will draw on outside resources whenever they are the most appropriate way to meet a particular training need.

However, it may be useful to identify possible resources before beginning to develop methods, because there may be preplanned activities (such as those in the CITP manuals) which will address the need, or there may be people who can address skill needs more effectively and efficiently than any group member. These "finds" would obviously effect the planning a great deal, and it makes sense to seek them out early in the process.

On occasion, it may make sense to move the resource identification process even **earlier** in the sequence—say, right after identifying needs. The reason is that thinking about resource possibilities can be a way to pin down just what it is the group wants to learn.

Group members can play a part in identifying resources within the group as well. The exercise above can be expanded to include this possibility; however, the "skills bank" form, mentioned earlier, will give a more comprehensive picture of what group members have to offer. A sample form and directions for its use are found in CITP's manual, **Planning, for a Change,** on pages 73 and 74.

10 ASSEMBLING THE TRAINING PLAN

In this chapter we assume that you have determined needs and objectives (Chapters 6 and 7), selected methods and found or created specific activities to address your objectives (Chapter 8), and identified suitable resources (Chapter 9). The step that remains is to assemble these components into an effective training plan. We have identified several parts of this step, which are the subheadings of this chapter:

- Sequencing the learning activities
- Groupings
- Pacing

SEQUENCING THE LEARNING ACTIVITIES

Suppose that you have identified three or four training activities that you want to combine into a workshop. Or perhaps you have a larger number of activities, components of a training series, that will extend over a number of separate sessions. Or perhaps you have been asked to help an individual develop a personal training sequence. How do you select the best possible sequence of learning activities?

Putting activities into a workable sequence is more of an art than a systematic science, but there are some guiding principles which can be useful:

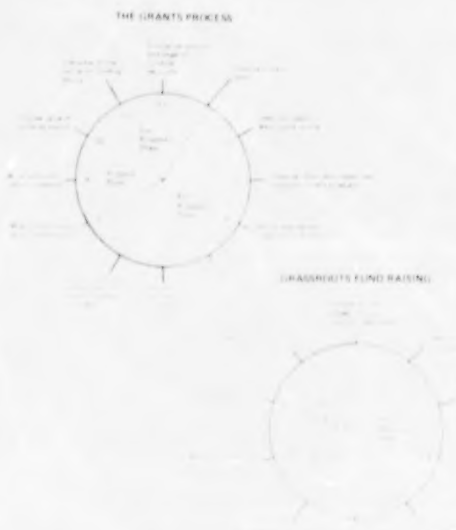
1. chronological sequencing
2. moving from the simple to the complex
3. moving from the general to the specific
4. starting with the concrete and moving to the abstract
5. moving from the personal level to the group level

We'll consider these one by one:

1. With **chronological** sequencing, events proceed in the workshop according to the same sequence they will follow in real life.

> Example: You want to develop the skills needed to turn a program idea into a fundable grant proposal. The training sequence could follow the same pattern as the proposal development itself. CITP's manual, **The Rich Get Richer and the Poor Write Proposals**, is based on a chronological sequence:
>
> 1. Develop long-term plans
> 2. Learn the basics about fund raising
> 3. Develop short term objectives; evaluate current programs
> 4. Set up appropriate organizational structures
> 5. Explore local/grassroots funding sources
> 6. Research possible major funding sources
> 7. Prioritize possible funding sources; finalize funding time table
> 8. Make initial contact with funding source
> 9. Write, edit and submit proposal
> 10. Follow up with funding source
> 11. Interview or site visit with funding source
> 12. Follow up positive and negative funding decisions
>
> (In this case and many others, the series of training activities might not be separate from a later "real" pass through the chronological sequence; workshop participants might develop a real funding campaign in the workshop, going through the steps systematically and self-consciously, with plenty of time for reflection.)

Steps in the Fund-Raising Process:



2. Another common sequence involves moving **from the simple to the complex.** This is especially useful for communicating skills or process-knowledge that is complex. A simplified version of the process can be presented, with a chance for participants to rehearse or role play their parts in it. Then the more complex version(s) can be introduced as variations on the basic theme.

Example: CITP's manual, **Planning, for a Change,** introduces the technique of brainstorming using the theme and variations approach (pages 44-45, reproduced in this manual, Chapter 8). The simplest version of brainstorming, with one group, is followed by variations which are more complex, such as two groups working in tandem on the same problem.

3. A related scheme for sequencing is to move **from the general to the specific.**

Example: CITP's manual, **How To Make Citizen Involvement Work,** is organized in this way. The first 20 pages present general concepts and viewpoints which provide an overview of citizen involvement. The next 20 pages provide a catalog of specific mechanisms for citizen involvement and the remainder of the book consists of activities which address specific situations: a diagnostic questionnaire to assess the health and strength of a specific citizen involvement effort, planning guides for setting up a watchdog group for citizen involvement efforts or a new citizen involvement group and improving an existing one.

4. Sometimes workshops or training materials **start with the concrete and move to the abstract.**

Example: CITP's manual on community organizing, **Power: A Repossession Manual,** encourages organizers to take some concrete steps to identify community problems, such as going door to door and asking people for specific complaints or incidents. Then it presents activities that allow organizer and community people to think together about root causes, which are usually abstractions or generalizations based on the specific symptoms discovered in a door-to-door survey (pp. 34-54).

5. One of CITP's favorite approaches is to move **from the personal level to the group level.** Thus you start with what is familiar, the experience of each individual—memories, friendships, commitments, interests and personal goals. Then it's possible to see how the personal perspectives of group members can be applied to a group concern.

Example: CITP has begun its recent goal-setting workshops on a very personal level. For the citizen advisory board of the regional programs for mentally retarded citizens, the sequence looked like this:

A. Working individually, think about one retarded person you know. Jot down some hopes you have for that person's life—ways that things could be better for that person.

B. In pairs, share what you have jotted down and discuss what you consider to be the barriers that make it difficult to achieve the hopes you have for that particular retarded person.

C. Reassembling the entire group (10-15), name the most important hopes and the corresponding barriers, and list them on newsprint.

D. Use this information as a guide in stating proposed goals for the agency programs. (From this point on, exercises can be drawn from **Planning, for a Change,** pp. 41 ff.).

Michael Chan

One of these five sequencing principles will probably be suitable, whether you are sequencing components of one activity, several activities within a workshop, or a longer sequence of activities within a conference or workshop series. There are several other considerations that also need to be considered: the balance of input, action, and reflection; the choice and sequencing of individual and group time; overall timing; and the integration of the learning activities into the life of the group.

INPUT-ACTION-REFLECTION

There needs to be a balance among these three functions. Too much input (such as a lecture) is more prone to produce sleep than learning. Too much action (such as a simulation game) can produce confusion. Reflection with no input or shared activity is likely to produce hollow generalizations.

It's impossible to specify once and for all what the balance should be. That depends on the content and the learning style preferences of the participants. There are some guidelines which may be useful:

- **Input**–Facts, concepts, new procedures, problem statements–often provide the focus of an activity. However, learning is often more powerful if key points are derived from the activity, rather than stated at the onset. Learners need the freedom to draw their own conclusions. The key point for one person is irrelevant to a second and "old hat" to a third. So consider jumping straight to the activity and allowing the participants to draw their own generalizations during the discussion or reflection phase.
  Be brief; remember that attention for oral statements often wanes after only five or ten minutes. Consider alternate formats for communicating information: mimeographed handouts, slide shows, maps, models, etc.
- **Action**, or activity of some form, is a cornerstone of most adult educaction. Role-plays and simulations, problem-solving activity, group planning and rehearsal of skills are all examples. If the learning objective involves a skill or procedure, use it; if the objective involves a concept, fact, or theory, work with it in some way. The activity should resemble the group setting in which it will later be used, so there will be little problem with transfer of what's been learned back to the real-world situation. In a workshop, action often takes the vast majority of the time. An advantage of working with a single citizen group is the opportunity to use the real action of the group–the meetings, the problem-solving sessions–as the action component, and that as productive a learning experience as possible, by attending to the input and reflection phases that could accompany it.
- **Reflection** is the phase in which learning is identified, consolidated, and connected back to the real life situations that the group is facing. This phase is often the most important, and there's a tendency among trainers to underestimate the amount of time it will take. Discussion is the typical group reflection activity, and it can be focused by a set of discussion questions or left open. Other ways to promote reflection include:
  1) A time for "I learned . . ." statements during which anyone who wants can state what they learned during the activity.
  2) A time for stating and discussing implications of the workshop for the group's work. This can conclude with individual or group commitments to take action. Sometimes the workshop facilitator may choose to turn the leadership back to the regular leadership of the group so that decisions can be made during the workshop in the style of a "business meeting."

GROUPINGS

An effective workshop design usually involves a mixture of groupings–large group (plenary) sessions, small groups, and sometimes pairing and individual work. Each grouping needs to be used when it is the most efficient way to meet a particular learning objective; there is also a need for variety and overall balance of groupings.

Individual work–good for brief reading periods, recollection of past experiences, completion of worksheets or response questions pertaining to individual situations; rest and "re-centering." Except for homework between sessions, individual work is usually kept to short periods (5 or 10 minutes) to take maximum advantage of the presence of other participants.

Pairs–good for discussions that allow the maximum amount of time for each person; for problem solving work in a consultation format; for establishing a personal contact (especially useful when most participants don't know each other, and most

WORKSHOP DESIGNERS

It has often been said that our society is one in which the ability to invent **things**–machines, tools, or consumer items–far outstrips our ability to cope with the social consequences of technological change, or to discover ways to relate more effectively, peacefully and satisfactorily with our fellow human beings. We need to develop our ability to make "social invention," which one author* defines as social institutions or processes invented to serve a specific social purpose.

Examples of social inventions include the institution of marriage, the public library, free public education, the bureaucracy (as a form of social organization), halfway houses, Alcoholics Anonymous, the jury system, the electoral college, correspondence courses education, and sensitivity training. All of these are inventions, the date of first use, and the inventor (or inventing culture) can be identified.

helpful early in the workshop), and for sharing personal information which might not be appropriate to share with the entire group. It's slightly more efficient to assign partners, but more intimate and usually more productive if people get to choose someone they'd like to work with.

Triads—groups of three deserve special mention. They allow much of the intimacy of pairs but provide one more source of ideas for discussions or problem-solving situations. A third person can serve as process observer of the interaction between the other two and can give suggestions on how to improve their communication and cooperation.

Small groups (four to eight people)—a group of this size is small enough to offer a reasonable amount of "air time" and perhaps a family-like sense of personal concern to its members, yet large enough that it will probably have several viewpoints on any issue and one or more high-energy leader types who'll always try to keep things moving. Also, it may be possible to prepare individuals who can act as small group leaders when a workshop breaks into this sized group.

Larger groups (nine to forty, approximately)—there is less individual identity except for the vocal minority. Good for introductory remarks, brief informational statements, reports of the progress of smaller groups, and some particular activities such as brainstorming (very fast-paced with many "brainstormers") or large group simulation games. Large group sessions are very important at the beginning, end, and perhaps some midpoints to create a sense that "we're all in this together" and an awareness of what other groups are doing. While it is important that these sessions occur, it is also important that they be kept brief. The smaller formats provide for more active learning and are the predominant forms in many workshops.

Mass audiences (larger than 40)—sometimes unavoidable for communication of information from one person to many, but should be used with great care. Occasionally, a very dynamic speaker can serve to motivate and give direction to a training project. However, the underlying assumption—that one person is in the know and the others are not—can undermine the self-confidence and self-reliance which training is meant to enhance.

If clear instructions and demonstrations of small group activities are given while in the mass audience, then participants can move to small group activities with almost the same advantage as if they had direct coaching.

Other considerations:

Achieving balance: There is no right way to develop a sequence of training activities or groupings. Typically a conference will involve a keynote speech (with a mass audience) and a series of small or large group workshops. There may be other plenary sessions before the conference is over; pairs and triads organize themselves spontaneously during breaks and meals. "Alone" time is hard to find. Some conferences create support or "core groups" that meet periodically to exchange information from different workshops and review what has been learned.

A citizen group workshop in which everyone knows one another might begin with a large group session for review of the agenda and brief initial input from a resource person, then build from individual work to pairs, to small groups, and back to the large group. Worksheets, discussion questions, role play instructions, or trained facilitators can provide structure at each step.

A workshop might begin with each person introducing herself to another person so that everyone knows at least one other person. Each pair could find two other pairs to form a small group, which would then pursue the first activity. There might be periodic use of pairs, triads, or large groups, but the group of six would stay together as the basic working unit of the workshop, developing a sense of teamwork and camaraderie.

See CITP's manual, **Working Together** by Bob Blair, pages 11-17, for more ideas on introductions.

AS SOCIAL INVENTORS

Workshop designers can rightfully see themselves as part of this tradition of social inventing. Each workshop design is a process invented to serve a purpose (objective) for the group. When we develop a role play, for example, we have invented a sequence of activities (beginning with the assignment of roles and ending with group discussion) that helps the group explore attitudes and acquire skills surrounding a real life situation.

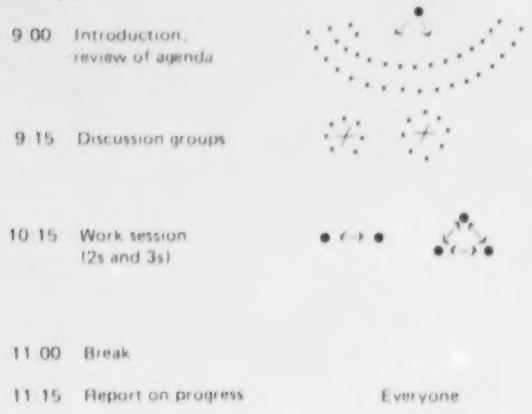
Seeing ourselves as inventors helps to understand the attributes we need to develop and use as workshop designers: **creativity**, to come up with the most effective learning process, and **good judgment**, to determine which of our learning activity/inventions will best serve the purpose we have in mind.

*D. Stuart Conger, **Social Inventions**, Saskatchewan Newstart, Inc.

Discussion Questions:

- *Consider a workshop or other learning experience you designed or participated in; think about the different groupings that were used and sketch them, using circles for people, one-headed arrows for one-way communications, and two-headed arrows for participatory interchanges. How well did the sequence of groupings work in that case?*

Example



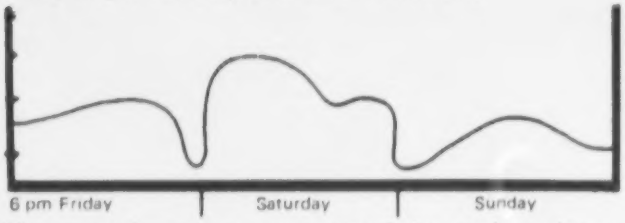
- *What contributed to the success or difficulty with the groupings? Were they appropriate for the activities? Was there an appropriate balance of different sized groupings?*
- *Could the effectiveness of the workshop have been improved by changing the groupings? Sketch your suggestions.*
- *If you are planning a workshop, sketch the groupings that you have in mind. What advantages or problems do you anticipate with these groupings?*
- *What changes in the groupings could you make that would improve the quality of the workshop?*

PACING

Allow enough time! Most trainers plan for too many activities, not too few. All too rare is the situation in which the facilitator has completed all the planned activities and the group gets to make some spontaneous choices about what to do next (go home early! go back to the discussion that started earlier, work on a problem that came up at the last business meeting). Typically, it is the time for reflection or discussion that gets underestimated, although instructions, regrouping, breaks, and the activities themselves may all take more (or less) time than anticipated.

At any rate, it's a good idea to develop a time schedule for the workshop and to try to stick to it. Posting the times for all to see can help; participants will understand how much time is planned and can see the consequences of pursuing a discussion past the scheduled conclusion. It's also a good idea to ask someone to record the actual time that each segment of the agenda takes, so that you can compare your pre-workshop time estimates and try to improve your estimating ability next time.

An effective training design needs to be paced according to people's natural energy levels. For example, when planning a weekend-long training session, the trainers could anticipate the energy levels that participants will have during the course of the weekend. They might come up with a curve like this:



The most important segments of the session, those requiring high concentration or containing lots of new ideas, would be scheduled for the high-energy times. Sitting still and listening passively should be minimized during the low-energy times, or people may fall asleep. In general, the strategy would be to counteract the dips (while not expecting too much from those periods) and take advantage of the highs for maximum active learning.

Don't forget to include unstructured time. Conference planners frequently allow time between activities or blocks of open time so that participants can meet informally and address their personal concerns. This is often a time of considerable learning and it may be the time during which participants decide how to use what they've gained from the structured sessions.

When designing a training session, common sense is the order of the day. For example, when estimating the time for introductory activities, less time will be required for groups that have been together for a long time than for new groups. The single most important thing you can do to insure a good training plan is this: **Put yourself in the participants' shoes and stay there until the design is complete.** It's the only way to insure a design that is appropriate. If you're not doing very well at it, bring in a participant to help you!

SETTING TIME FOR TRAINING

Somewhere along the way you need to get your group to consider when it wants to hold training sessions. There are a number of likely times for training:

- When a number of new members join the group
- When a new project, requiring new skills, is beginning
- When someone with special skills steps down from an office or leaves the organization
- Whenever a learning need is identified
- On a continuing basis (monthly workshops, for example), addressing the most pressing learning needs of the moment

Training activities within an on-going group do not need to happen at workshops; they can take place as planned parts of regular meetings, or as spontaneous additions to work sessions. (The training coordinator can't pre-plan these spontaneous training sessions, but ought to be ready to seize an opportunity which arises and call for a discussion, role play, or other activity which will meet the need of the moment.) Individual learning can, of course, take place between and during every meeting of the organization.

A group which is ready to make an on-going commitment to training will need to explore the preferences of its members for different workshop times and lengths, and select a schedule in keeping with those preferences.

Case Study: DESIGN OF A CONFERENCE

Recently, a CITP staff member was part of a team of five that designed and ran a two-day conference on small businesses owned and operated by workers and/or the local communities. A summary of that experience is included here because it illustrates some key points in the design of training activities:

. . . that the principles in this manual are useful in planning conferences as well as workshops

. . . that a team of planners can meet informally, develop a style of working together, and produce a training event

. . . that training can be provided very inexpensively if committed volunteers are available

identify broad topic

"A group of five people gradually got to know each other and discovered that we shared an interest in small, cooperatively run businesses. We wanted to see what we could do to encourage and assist such enterprises, so we started exploring the idea of a weekend training conference.

identify target audience

We made some tentative decisions about the target population (Western Massachusetts residents involved in, or planning, a worker-or-community-controlled business), and found several mailing lists that matched pretty well with this targeted audience. Our first mailing consisted of a needs survey which asked about degree of interest, topic preferences, desired times and formats, and names of others who might be interested.

conduct needs survey

summarize findings

There was clearly enough interest to go ahead. People wanted a two-day weekend conference in March or April. (It was then January.) We had provided 40 possible topics; we tallied the votes, and identified the top ten. There was interest in a mix of skill, and a philosophically oriented session.

specify purposes (objectives)

The survey confirmed our image of the target population and inspired us to hammer out a statement of purposes for the conference: to provide skills needed by people involved in small, locally-owned cooperative business ventures; to provide a forum for discussing the advantages and disadvantages of the various forms for such enterprises; and to form a network of individuals and agencies interested in supporting the growth of such enterprises. We spent a lot of time deciding on these purposes and discussing the ways the conference would achieve them, but it was time well spent. We were able to approach the details of conference planning with a sense of where we were headed and how to keep the design on track.

coordination and trust building among planning team members

conference design

We blocked out a basic schedule, with 1½ hour workshops as the core of the conference. There were to be five workshop periods with about seven different workshops offered during each period. The topics were those identified by the needs survey; the most popular topics were offered several times. The skill topics had

introductory and advanced sessions, and some topics had parts I and II so that they could extend over three hours. Half-hour breaks were left between sessions to allow time for an informal exchange of ideas.

identify available resources

The planning team identified resource people who could lead workshops on the various topics. We listed more people than we could use; the ones we contacted first were those we thought would be strong at running an effective training **process** *as well as being strong on the topic. Some workshops were led by a team, and if we had to, we got the balance of content and process by choosing one person who would be strong at each.*

concern for content **and** process

Once we had our list of resource people—32 in all—we encouraged them to contact others with related topics to coordinate the content of the workshops. We asked for a written description of each workshop, including content, training activities planned, and intended audience.

participants as resource people

We also decided to encourage any interested conference participant to conduct a workshop. We promoted this idea in our publicity and set aside a room where it could happen.

minimal use of mass audience situation

Plenary sessions were kept to a minimum; we were hoping for around 120 people, which is too many for real participation. So we scheduled a brief opening talk on Saturday morning and a wrap-up discussion on Sunday afternoon.

publicity

Because we had a very specific target audience in mind, our main channel for publicity was direct mail. Everyone who had received the needs survey was sent a conference brochure that set forth the purpose, goals, and tone of the conference, the list of topics and resource people, the date, location and a map, the fee, description of child care arrangements, available accommodations, and contact people for further information.

setting expectations

A press release and public service announcements generated a limited amount of coverage in the region's mass media, but our impression was that the direct mail really did the job. The success of the publicity effort was indicated by the fact that we had planned for 60 to 150 people, with 120 as the optimal number; we actually got 130, almost all of whom were involved in some form of cooperative economic enterprise.

size estimates

Publicity, workshop design, and resource people were arranged by different task forces, which were subcommittees of the training team. There were one to three people on each task force; any major decision was referred to the whole team. There were two other task forces—logistics and finances.

task forces

The logistics team was the largest and had the most work to do. They located the site, planned the registration process, arranged for catering by a vegetarian cooperative restaurant, lined up volunteers to do child care, and found local people who could provide sleeping space for the Saturday night.

logistics

The logistics task force also planned a variety of communication devices which contributed a lot to the success of the conference, such as name tags, a literature table where participants could display their groups' literature, a board for messages, and a conference feedback board for recommendations to the planning team. There was a workshop schedule in each participant's handout packet, but it was supplemented by a huge schedule board which gave every workshop title with a detailed description, the names of resource people, times and room numbers. Near it was a "Conference Update Notes" board which alerted participants to issues and concerns which were emerging.

communications at the conference

The logistics team also dealt with the more mundane needs: each workshop room had to have chairs, a table, blackboards, chalk, newsprint, felt-tip pens, masking tape, water, cups and coat racks. Audio-visual equipment was set up for those resource people who needed it. Volunteer note takers were designated for each workshop.

supplies

There was a contingency plan for overflow—some rooms had accordion room dividers to provide more room; there was also a larger room which was available if needed. The one contingency for which we hadn't planned was an elevator failure midway through the conference. All our meeting rooms were on the ninth floor; the only solution was an emergency stairwell which led past seven floors of locked doors to the outside.

contingency planning

team-building

The conference weekend started with a Friday evening potluck supper for the planning team and the resource people. This was a time for getting to know each other, building a group spirit, and making sure the resource people were familiar with the schedule and other details. We discussed workshop methods and encouraged resource people to establish a tone of dialogue, cooperation, and open inquiry.

During the conference, the planning team was able to lead or attend workshops, thanks to the time we had taken in preplanning. The person at the registration desk always knew where we were if needed.

monitoring progress

There were several methods for evaluating the conference while it was going on. The Conference Feedback Board was an opportunity to post suggestions. An evaluation sheet, distributed at registration, had space for a very brief evaluation of each workshop that the conferee attended and the conference as a whole.

The planning team met after each workshop and during lunch times to check the feedback boards and evaluation sheets to see if any changes were necessary. In general, we were able to take the role we had hoped for at the conference—helpful, available, knowledgeable; guiding the process by planning creative structures that facilitate learning and interaction.

final evaluation

During the final plenary session, there was an informal feedback discussion; comments and suggestions were recorded on newsprint. Follow-up phone calls were planned for three months after the conference to see what changes resulted from the experience, and whether participants are using what they learned.

finances

Maybe there "aint't no such thing as a free lunch," but this was a free conference; there was no charge for admission, child care, or lodging. The total cost of $155 for 130 people for two days was covered by the planning team. A poster and donation box at the registration desk produced $82, leaving a deficit of $73 ($14.30 apiece) which the planners were willing to absorb."

Overall Conference Evaluation

1. I felt the conference was (check one) ___extremely helpful ___ helpful ___ so,so ___not very helpful ___ useless

2. Why? (one sentence)

3. What did you gain most from in this conference? (a word or two)

4. What did you gain least from? (a word or two)

5. To improve the conference, I would: (one sentence)

6. Please rate the conference according to each of the following criteria by circling a number from one to five:

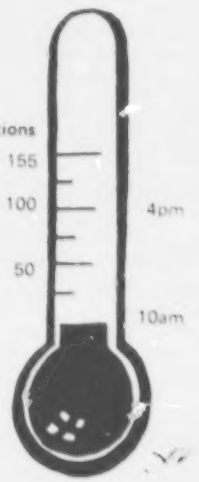
	Excellent				Poor
Food	1	2	3	4	5
Scheduling	1	2	3	4	5
Saturday evening session	1	2	3	4	5
Sunday afternoon session	1	2	3	4	5
Location	1	2	3	4	5
Keynote address	1	2	3	4	5
Accommodations	1	2	3	4	5
Rooms and equipment	1	2	3	4	5
Workshop sessions	1	2	3	4	5
Resource people	1	2	3	4	5
Conference communication	1	2	3	4	5
Conference (overall)	1	2	3	4	5
Other	1	2	3	4	5

I would be willing to work on continuing the educational effort begun here: ___yes ___no ___not sure

Name (optional, but preferred) _____

Conference Costs

Phone	$ 30
Postage	15
Printing	25
Rental	60
Materials	25
	$155



11 FINAL PREPARATION

Before a training session, there are a number of practical considerations to deal with in order to ensure a success. The trainer, or a very trustworthy helper, needs to think about the site and its set-up, supplies (including any refreshments), and publicity. And—most important—the trainer or training team needs to schedule and carry out a rehearsal of the training session. This chapter, composed mostly of checklists, will serve as a guide for these final preparations.

THE SITE

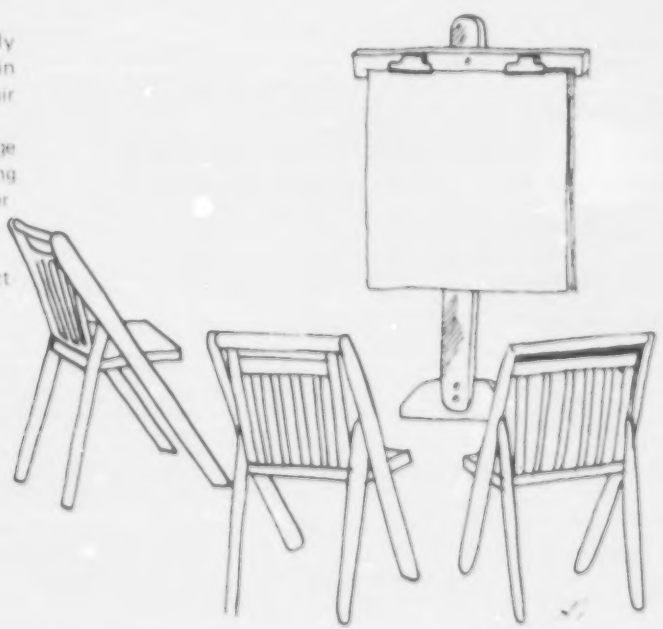
Questions to consider when choosing a site:

- How many participants are you expecting? What is the maximum number you need to be prepared for?
- How many rooms do you need? What size?
- Does your potential site have comfortable meeting space in the right sizes and quantities?
- If your training design calls for several small groups, will they be able to meet and talk without disturbing one another?
- If you plan to use AV materials, are there appropriate facilities? (Can the room be darkened? Are there adequate power outlets?)
- If you are planning for some type of childcare, is there a suitable space for it?
- Is there adequate lighting?
- Is the facility easily accessible to participants, not only by car, but also by mass transit or by foot? (Obtain directions and a map.) Is it accessible to wheel chair users?
- Will the institutional setting encourage or discourage attendance? (For example, would a university setting seem forboding to your group? Would a religious conference center seem inappropriate?)
- How do you rate the overall quality of the facility?
- Is there a fee for the use of the space? Are you expected to pay for the services of a janitor or traffic officer?

Once you have selected a site, there are some additional things to consider in order to make the best use of it:

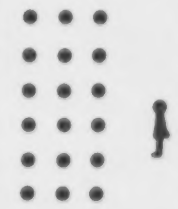
- Will signs be needed to the meeting room, the registration desk, the designated parking area?
- Who will set up chairs and tables? Are there enough, or will more be needed?
- Are any of the following available at the site? (check if available):
  - _ projectors
  - _ screen
  - _ public address system
  - _ coffeemaker
  - _ meals (at the facility? nearby?)
  - _ other:
  - _ other:

You may want to add other concerns to this list. If you frequently have to find a suitable facility, you may want to convert the list into a "facility scouting worksheet," with spaces to record your assessment and make notes.



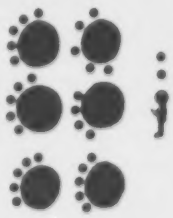
PHYSICAL ARRANGEMENTS

The way you arrange your physical space determines the way participants will arrange themselves, and that has a lot to do with the way they will work together. Here are our opinions about a variety of common set-ups:



1. (The traditional classroom.) Not recommended. Attention goes from many to one. (This setup discourages eye contact among learners.) Not in keeping with the idea of learning from one another.

2. Worse. The raised platform increases the social distance between teacher and learners. See section on mass audiences in Chapter 10.

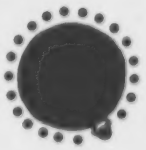


3. Slightly better. The groupings around the tables can be used for discussion of the speakers' input.

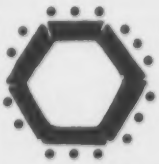
4. Acceptable. The circular arrangement gives all participants an equal status and the opportunity for eye contact. The double ring is not ideal, but may be better than a huge single circle if the group is large. See 7 and 10 below.

5. Variation on 4 when chalkboard or newsprint is required. At times, people other than the leader might stand at the front.

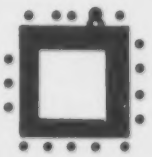
6. The traditional seminar arrangement. Gives relatively equal status to all and conveys the expectation that all are welcome to contribute to discussions.



7. With or without a table, this circular arrangement is better then 6 because it provides equal opportunities for eye contact all the way around the group. No one is in a blind corner, and no one has special status at the end of the table.



8 and 9. Variations on 7.



10. Variation on 7; two or more simultaneous discussion groups, guided perhaps by a volunteer leader or simply by a set of questions. Trainer is free to monitor progress. Remember to leave enough distance between groups so that they don't distract each other.

11. Discussion groups can be as small as pairs or triads. See the commentary on groupings in Chapter 10.

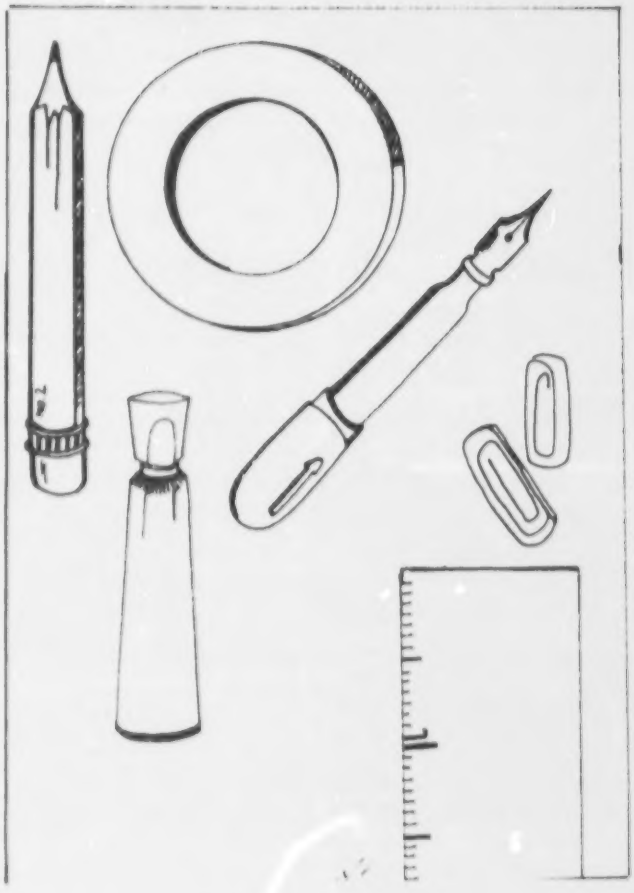
12. The "fishbowl" arrangement. See Group 5 (Process Observation Methods) in Chapter 8.

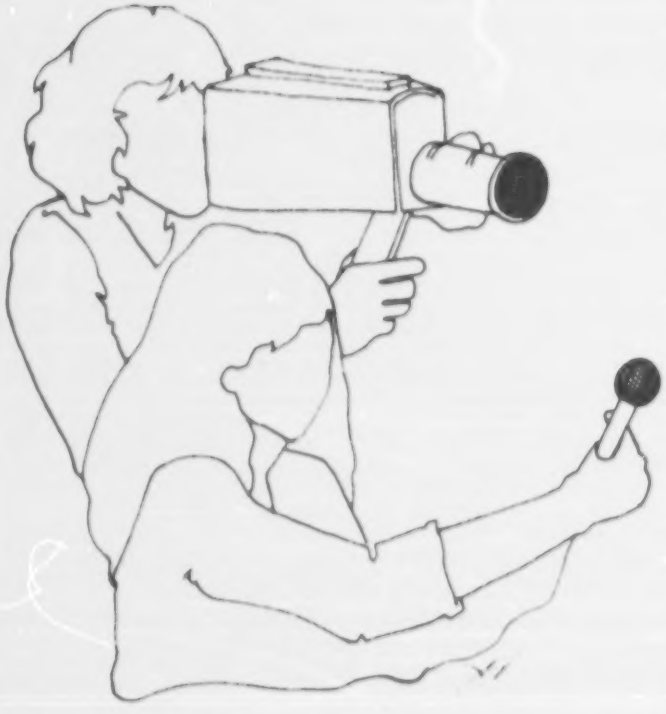
13. One of CITP's most common arrangements, especially in a sequence which includes 10 or 11. Discussion with a newsprint summary can make the difference between a rambling conversation and problem solving. (See Chapter 12, item 22, on the use of newsprint.) The single ring makes this arrangement better than number 5 (everyone has front-row seats!). Can be used for brainstorming, information presentations, and many other formats. When the newsprint isn't needed, the leader can move in a seat to form a circle, converting the arrangement to a single ring.

SUPPLIES

Check the items you will need (✓). Cross the check (✗) when an item has been packed to go.

- _ Newsprint
- _ Felt-tip markers
- _ Roll of masking tape
- _ Easel
- _ Chalk and blackboard
- _ eraser
- _ Name tags
- _ Cork board (or equivalent) for messages
- _ Thumb tacks
- _ Paper clips
- _ Stapler, spare staples
- _ Rubber bands
- _ String
- _ Blank pads of paper (8½ x 11 or smaller)
- _ Pens and pencils
- _ Scissors
- _ Roll of cellophane tape
- _ Portable typewriter
- _ Correction fluid or tape
- _ Films, slides, audio or videotapes
- _ Slide or film projectors
- _ Screens
- _ Video tape equipment
- _ Audio recording equipment
- _ Long extension cord
- _ Cash box
- _ Preregistration list
- _ Receipt forms
- _ Refreshments
- _ Coffeemaker
- _ Water heater for tea
- _ Cups, spoons, napkins, etc.
- _ Handouts (adequate quantity for all participants)
- _ Supplementary reading materials for display, distribution, or sale
- _ Supplies for any games, role plays, etc.
- _ Large (newsprint) version of agenda
- _ Evaluation forms
- _ Map of site for registration desk (if there are several rooms or buildings)
- _ Other: _____
- _ Other: _____
- _ Other: _____
- _ Other: _____





PUBLICITY

Even if a training session is designed for the members of one group only, publicity is important. You will want to make sure that all the active members attend, and you may be able to use the session as a time to reinterest the inactive members. One oral or printed announcement is not sufficient; repeated reminders and personal recruitment are almost always a good idea. Here are some points to consider:

Do all potential participants know of the workshop? Has there been a mixture of printed and word-of-mouth publicity?

Do potential participants have an accurate impression of what to expect? Or, to put it the other way, does the workshop plan meet the needs and expectations of the people who are likely to be attracted by the publicity?

Do all potential participants have clear directions for arriving at the site? Accurate information about starting and ending times?

If there are preconference materials (readings, etc), have they been sent out or delivered? Have they been received?

For more ideas about publicity, see CITP's media manual, **We Interrupt This Program . . . .**

REHEARSAL

Perhaps the single most important thing you can do to ensure a successful training session is to rehearse. Many experienced, professional trainers consider some form of rehearsal essential.

A rehearsal is probably the best thing you can do to improve the quality of the training.

What you rehearse is a matter of judgment. You might do a complete run-through with a small group of friends, or you might try out only those activities which you're uncertain about. But even if you decide not to do any activities in the rehearsal, practice your introductory remarks, mini-lectures, instructions and transitions. You will probably not be talking much in a training session, but the talking you do can set a positive tone or create confusion, so it's important to say what you mean, and to feel relaxed and well prepared.

There are other possible participants for a rehearsal; if you can't recruit a small group of friends, try your coleaders (if there are any), your spouse, or trainers from other citizen groups. If all else fails, there's a solid tradition of rehearsing in front of the bathroom mirror. That has the disadvantage of giving only visual feedback and no suggestions—important elements which live participants can provide. Another option is to rehearse into a tape recorder and play it back.

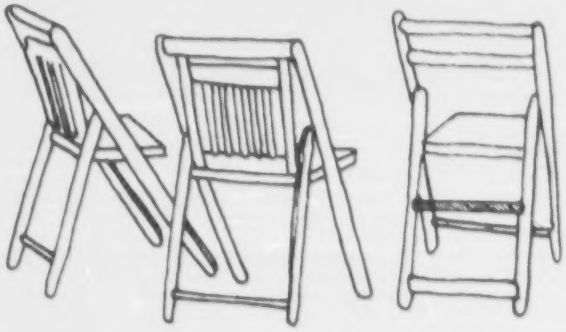
Before a rehearsal, assemble whatever notes you will want to use at the session—an agenda with notes to yourself, a set of 4 x 6 cards, or whatever. Also, assemble the supplies and handouts specified on your packing list.

After the rehearsal, consider these points:

- Is the design sound? Does it seem to address the objectives in a way that will be meaningful to the participants?
- Were introductory remarks, mini-lectures, and instructions clear and informative? Do they set an appropriate tone for working collaboratively?
- Were the transitions smooth? Was there a good flow from one topic to another, from one leader to another (if there are two or more), and from one grouping of participants to another?
- Are the time estimates realistic? Does the agenda need to be revised in any way?
- Is the packing list complete? Are there other supplies that are needed?

You may also want to consider the suggestions for facilitators in Chapter 12 and, before the actual training session, identify points that need work. The real point of a rehearsal is to become familiar and comfortable with the training plan and your part in it, so that you can focus your energies on helping people learn.

If you make substantial changes as a result of the rehearsal, you may want to hold a second one. (Consider how much rehearsing a play requires!) If it all goes smoothly the first time, congratulations!



12 FACILITATING LEARNING

You have arrived at the place scheduled for a training workshop; everything is in order—your plans and notes, the chairs, newsprint, and refreshments—and people are starting to arrive. Now all that's left is to make sure things go well.

This chapter presents suggestions and guidelines to help you see that things do go well, but first we ask you to consider your experience with learning facilitators or trainers in the past.

Exercise: WHAT MAKES AN EFFECTIVE FACILITATOR?

number of people: one to many
minimum time: 20 minutes
materials: paper and pencil

Process:

1. Working alone, recall a time when you were involved in a group learning situation in which the trainer, teacher or facilitator was especially effective and helpful. Take a couple of minutes to picture the situation in your mind. It could be a memory from public school, an adult training workshop, or on-the-job vocational training—any group learning situation that you've been in. Then jot down all the things that the facilitator did to help make that an effective learning situation. What did the facilitator do or say, and how did he or she maintain motivation, and set the general climate for learning?

2. (Optional) You may also want to recall a time when group learning was especially ineffective, and remember (and jot down) what the facilitator was doing in that case.

3. Now form groups of three to five people each and share what you've written down, starting with a **brief** description of the situation you had in mind. Allow a minute or two per person. Someone might want to make a summary list on newsprint under the heading: "Some Characteristics of Good Facilitators." A separate list could be made to summarize responses to step two.

Discussion Questions:

- *Of the "Characteristics of Good Facilitators," which ones do I have already?*
- *Which ones would it be most useful for me to develop or acquire?*
- *What steps do I need to take in order to begin/remember to do them?*
- *What help do I need from other group members in order to implement them?*
- *What other characteristic could I adopt easily?*

THE ART OF FACILITATION

Here are some suggestions for effective facilitation of learning activities that we (CITP trainers) try to hold to. They begin with a recap of the previous chapters, because learning climate, analysis of needs, and the plan for learning are never fully resolved; they may need to be reviewed and perhaps changed during the course of any given workshop.

1. **People need to feel they're being listened to**, and that their ideas and concerns are recognized as worthy and important contributions. So a facilitator needs to listen attentively to all participants, maintaining eye contact with each speaker; contributions need to be responded to and perhaps recorded for all to see. Discussions need to build on earlier statements; if they don't it may be helpful to summarize the points which have been overlooked.

It's also essential that the facilitator avoid discrimination and, for example, develop alternatives to the exclusive use of male pronouns (**he, his, him**)—such as "he or she" or alternating use of male and female—in written **and** oral presentations. These points cannot be seen as "frosting on the cake" of good facilitation—nice if I can remember or get my courage up—they are **essential** to the trust and safety of some members whose contributions are especially important to obtain because they have probably been systematically ignored in the past, in other settings if not in the group at hand.

Confidentiality is the other issue which influences trust levels. If personal histories or opinions are aired it may fall to the facilitator to say:

> "It seems like we'd better consider what is said within this workshop to be confidential."

and to make sure the group agrees about what "confidential" means in this case. If at a future time there seem to have been breaches of confidence, the facilitator or some other leader should restate the group norm and possibly call for an airing of the specifics from both points of view or simply secure a renewed commitment to the norm of confidentiality.

2. **People need to feel validated** as equal and important members of the group. We hope the facilitator will not be the only one who generously (but honestly) offers comments like "I'm glad to see you here" or "I like that idea," etc.

3. **People need to feel accepted.** An opportunity for everyone to introduce themselves, if they aren't all familiar with each other, is essential. (It's not enough for the **facilitator** to know names and personal background.) Depending on time and the purpose of the workshop, introductory remarks might include a statement of where you live, what you hope to gain from the workshop, your role or major activities with the group, the best thing that happened to you over the past few days, and a statement about the skill or experience which you bring to the workshop. Nametags are a good idea unless you're **sure** everyone knows each other's names.

4. **People need to feel a sense of trust and safety in the group.** The preceding suggestions should all help here too, but it is especially important that negative comments be interrupted by the facilitator (or other group members). Nonverbal behaviors can communicate a "put down" too; not looking at certain people, or looking bored, can hurt more than words. Butting into a discussion before someone has finished undermines trust, so do side conversations.

Comments which imply the superiority of one sex, race, economic class, ethnic group or age group over others are very destructive of trust and safety, even though the victim of the remarks will probably not feel safe enough to express the hurt. The speaker will probably have intended no harm at all; however, a facilitator should be prepared to interrupt such remarks, tactfully but promptly and firmly, by comments such as:

> "Joe's comment just now expressed a pretty common assumption in our culture—that teenagers and elders have less to contribute to a group like this than the rest of us. But the facts just don't support that notion, and I want to request that we eliminate that sort of bias from our discussions."

5. **People need to feel that they are able and expected to give suggestions, lend support, take initiative.** It is very difficult to learn how to be a more effective participant in social issues through training activities that encourage passivity. In order to counteract the passive model of learning, which comes from years of sitting in lectures, the facilitator may need to say something like this at the beginning of a workshop:

> This training workshop will represent a very different style of learning than you experienced during your school days. You are going to be expected to raise questions, suggest changes, and in general do whatever you need to in order to learn as much as you can today. You are also an important resource person—each of you—and I hope you'll be sharing your experience and giving advice and encouragement to others (including me) during the course of the workshop.

6. **People need to know it's OK to ask for suggestions and encouragement.** Many public schools had a competitive atmosphere which made it unsafe to admit that you needed help. But the success of a citizen group depends on the success of every member in developing skills and competencies. So it's essential to be able to ask for help when you need it, for encouragement when an activity seems difficult or challenging, and for appreciation when there are new accomplishments. The facilitator can help by modeling these behaviors (by **doing** them herself for all to see), or by making a statement encouraging people to ask for help. Another way to do it is with a statement geared toward the specific situation:

> How are people feeling about the activity we're about to do? Does it seem easy or difficult? Is there anyone who would like some clarification or some special help with it?

7. **People need to know that their life experiences are an important and valuable resource** to be drawn upon and shared for their own learning, and the group's learning as well. Especially those people with less formal education need to be reassured that what they have learned through experience is fully as valid and worthwhile. It may be helpful to have the facilitator say that explicitly. Activities and discussion questions should invite sharing of experience.

8. **People need processes that allow for the free release of their feelings and thoughts.** Again, a well planned activity will provide encouragement for this. The schedule should allow plenty of time for discussion; activities are the stimulus and the shared experience which provides a basis for focused discussion and decisions about how to implement new procedures or ideas.

9. **People need an atmosphere where they can be taken seriously, while at the same time allowing for laughter, humor, errors, and flexibility.** Lightness and fun have an important part to play in a workshop; if people are enjoying themselves they are also probably open to new ideas. If they are feeling comfortable enough to risk making mistakes, they are likely to experience much more rapid learning.

10. **People need processes that allow for resolving conflicts without somebody winning at another's expense.** When the trainer identifies a situation in which two people's ideas are in conflict, it is usually not good enough to point to a "right answer"—it is important to recognize the valid components of the other answer, and to strive for a creative blend solution which taps the best of both people's ideas.

11. **People need the opportunity to evaluate their learning** and express

their satisfaction, dissatisfaction, or suggestions for future improvement. This is one of the most important ways that the learners can take charge of their own learning—by guiding the development of future learning plans. Also, accomplishments deserve to be shared, and frustrations need to be communicated, rather than being turned back in on the learner ("I don't know how to learn," etc.).

12. **People need to feel they are engaged in a meaningful and important activity.** In school, we were expected to take it on faith that what the teacher had to say was important. In a workshop, it is essential to explain the purposes of learning activities, and it's useful to allow participants to question, clarify, and even change the purposes at the start of a workshop to ensure that they are motivated and committed to the activities.

13. **People need to develop new ideas about the teacher-student relationship.** In school, the teacher determined content, directed learning, maintained discipline, and judged performance. The teacher was older, stronger, and usually wiser. There is a tendency to expect the same of adult educators, even if that isn't appropriate.

In training workshops, the facilitator may have chosen the content, but with group input about needs, objectives, and preferred methods. The facilitator creates opportunities for the group, not mandatory activities.

The facilitator doesn't have all the answers. (Of course, neither did the classroom teacher.) Although the "good" teachers would promise to "go look it up" for us, the facilitator does better to participate **with** the students in the learning process. Rather than presenting an image of someone who knows it all, the facilitator can be someone who is eager to learn, with a lot of good ideas about how to learn, where to find out, how to acquire new skills.

The trainer and each participant share a mutual responsibility to achieve the desired learning. The trainer can emphasize the democratic nature of training and can help participants be aware that they are in charge of their learning, that it is **their** business being conducted, and that each person has contributions to make. The trainer may find times when participants are effectively taking control of their own learning so that the trainer can literally slip into a back seat, or become another participant, in the interest of building independence among the learners.

14. **People sometimes need help to overcome old patterns of passivity and feelings of inadequacy.** In a discussion session, it's possible to ask for the thoughts of those who haven't spoken yet, or to set a guideline from the beginning that no one speaks twice until everyone has spoken once. It may help to check out the concerns and reservations of those who are holding back, probably in one-to-one discussion. It may help to make a statement such as this:

> In school, some of us got the impression that we were especially bright and capable, while others were led to think of themselves as

bad students or not very bright. The fact is that we've all got a lot more ability than we have ever used. In an atmosphere of caring and support for each other, we can all develop toward our fullest potential.

15. **People need to know how a learning activity relates to "real" situations.** Even if the learning activities use the actual problems and situations that the group is confronting, it's important to help participants make their conclusions explicit. This can be done in discussion sessions by raising such questions as: "Exactly how will we use the ideas that have come up today?" or "Are we willing to try this new procedure on a regular basis?"

16. **Even the best of learning plans will not hold the attention of participants 100% of the time.** The trainer can use the attention level as a gauge of how well things are going. When energy droops and people begin to fidget, that's a signal to check whether things are repetitive, off the point, or boring. The facilitator can also ask the group what's going on: "It seems as if a lot of people are less interested and less involved then you were a while ago. What's going on? Where should we go with this?"

Usually the learners will know what's up, and the question is an indication of the facilitator's respect for them, a reminder to them that they can shape the situation to meet their needs.

Raising the question does imply a willingness by the facilitator to be flexible—to change the scheduled activity, to have a break, to make (or elicit) a summary of what's just happened, or to lead three laps around the building.

17. **People need to understand where in the planned sequence of activities the group is.** An agenda should be posted and/or distributed, explained, and referred to periodically. This can help to reduce feelings of being lost and also helps the participant decide when it is most appropriate to raise a particular question or concern. **It is vital to the shared control of the workshop process.**

18. **People need to have real control over how they spend their time.** The agenda should include time estimates for each activity or a targeted time for starting the next. If necessary these times can be debated or revised at the start of the workshop or at a preliminary planning session.

A time schedule is only helpful if it is used. The facilitator needs to keep an eye on the clock or appoint someone else to do this. If an activity looks like it will run overtime, the group should have the opportunity to decide whether to cut it short, drop a later item, or extend the workshop to include everything. The facilitator should try to make realistic time estimates for learning activities, allowing adequate time for the sort of discussion which allows participants to understand and incorporate new skills and information. To some extent the facilitator can move things along and keep discussions tightly focused when necessary to hold to a schedule, but decisions to run overtime or omit parts of the agenda should be made by the group.

Especially if a workshop is on a tight time schedule, it may sometimes be useful to time individual contributions to a discussion. For instance, imagine that seven people have just completed a learning activity and have ten minutes left to discuss it. They could pass a watch with a second hand, asking the next speaker to time 60 seconds and asking each speaker to stop at the end of that sentence. There will be seven succinct statements representing everyone's viewpoints and three minutes left for open discussion. Some will say that such timekeeping is oppressive, but it is also oppressive to have a few assertive participants hog the floor and ramble on.

19. **People need real evidence that their efforts to shape the learning experience will have some impact.** The trainer needs to be flexible in order to be genuinely responsive, willing to adapt to the learning needs of the group at any particular time, able to add, delay or even scrap the prepared agenda in favor of relevant and imme-

diate activity that may arise at the moment.

A trainer who speaks in favor of democratic principles needs to practice them. People sense and resent disparities between what's preached and what's practiced; real flexibility and real shared control are essential.

20. **People need an adequately comfortable physical environment in order to learn most effectively.** The space you have arranged for should have adequate lighting, heat, ventilation and square footage for the purpose; should be relatively free from the noise and visual distraction of other nearby activities; and should contain chairs that are comfortable (but not too), and moveable, so that different groupings can be formed quickly. It's important to provide a well-lit space for newsprint, chalkboard, or other visual displays.

During the workshop the facilitator needs to monitor these conditions; participants sometimes forget that they can change things as well as the leader can! Is it getting too hot, too cool, too stuffy? Did the subgroups set up too close to each other so that now they can't hear themselves think? Is the plenary session too spread out so that there's no sense of being together?

If there is no house rule against smoking, the nonsmokers present may ask that smoking be restricted or eliminated; the facilitator needs to help the group find a satisfactory policy about smoking as part of her overall concern for the physical comfort of participants.

21. **People need to have a sense of forward progress.** The facilitator can help by spotting trivial discussions, endless debates, and reinventions of the wheel. If there is any doubt, the decision about relevance should be raised before the group. Topics which merit consideration, but are not part of the planned activity or discussion, can be flagged for later attention.

22. **People need to be able to see where they've come from.** CITP's solution is to use newsprint extensively as a tool for group thinking and problem solving. Summarizing major discussion points on newsprint with felt pens dramatizes the variety and extent of the group's thinking and contributes to the sense of progress by helping people refer back to earlier ideas and expand on them. Newsprint notes can sometimes serve as the minutes of the session; their advantage over chalk and chalkboards is that they can't be erased and they can be taken to the typewriter and copied for later distribution. They can also be saved for use at a follow-up meeting.

Jackie Hayden

Here are some guidelines for the effective use of newsprint:

- Write (or print) clearly, large enough for all to see. In a large hall, that may require 2" or 3" letters. (Large-format newsprint, 24" x 36" is hard to find but very desirable.)
- Use abbreviations or key words only if they are understood by the entire group.
- Put a heading on each page. The heading might be the question under discussion. Not only does this clarify things later; it also reminds participants during the discussion what the focus is.
- From time to time, check that you have recorded (or summarized) people's points accurately.
- Often a newsprint session will generate lots of ideas; there will be a need to pick out a few to focus on in the next part of the discussion. Devise a method for choosing the most appealing ideas (vote, a point system, consensus, etc.), then discuss the chosen ideas further.
- There are times when using newsprint gets in the way; be sensitive to the times when people need to look each other in the eye and talk, rather than looking at the newsprint.
- Be willing to share the power of the pen. Invite others to take the newsprint notes. At times you may want to invite speakers to summarize their own points.
- One variation on the use of newsprint is what we have called a "graffiti brainstorm": it requires several felt pens and a stretch of wall papered with newsprint, or the equivalent in butcher paper. Post several discussion questions at the top of the newsprint sheets and invite group members to come up and write their answers. There can also be multiple choice questions with space for tally marks.

13 ASSESSING PROGRESS

In this chapter we take a practical approach to the matter of evaluating your training program. There's an emphasis on answering the basic questions:

- Why do an evaluation?
- Where to look for results, for changes?
- How to know whether you've succeeded?
- What to ask?
- When to do it?
- What to do with the information you gather?

The chapter contains sample questionnaires and other tools which can be used in evaluating the results of citizen group training, but we start with the first of the questions just listed.

WHY DO AN EVALUATION?

Every training activity needs some form of evaluation. Participants deserve an opportunity to reflect on what they've learned, how far they've come, and what benefits have resulted from their new learnings. The trainer will take a special interest in evaluation, because she will want to decide whether the training plan is on target or whether some of the planning decisions will need to be revised in the future.

Evaluation is a matter of comparing expected results with actual outcomes—for the individual member, the group, and the community.

During our school days, evaluation meant examinations, and the focus was on whether we learned our lessons. But exams were also a test of how well the teacher taught—whether she was able to get her message across effectively. We don't think exams or grades make sense for citizen group training, but we do think the trainer needs information upon which to base planning decisions such as these:

- Are the focus and the objectives of the training appropriate? Are they based on an accurate assessment of needs? Are the real problems being addressed? Also, do participants understand and agree with the objectives?
- Are the methods and activities suitable? Are they achieving the objectives? Are they being carried out effectively?
- Is there an effective climate for learning?
- Are informational presentations appropriate and effective?
- Are there adequate resources (content specialists, printed matter, audio-visual aids, etc.)?
- Is enough time being allotted for training? Is the pacing of training activities appropriate?
- Are skills and information being conveyed in such a way that participants can carry them back to real world situations and use them successfully?

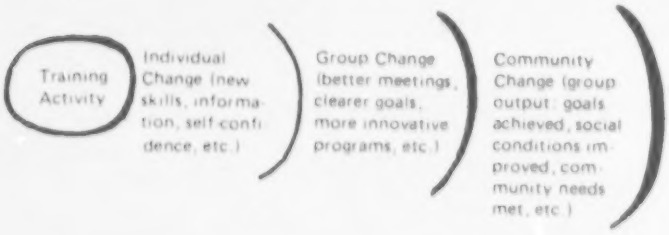
WHERE TO LOOK FOR CHANGE

Evaluation is a matter of looking for changes (we hope improvements!), comparing those changes with the results you hoped to achieve, and then deciding whether to revise your methods in the future. So, in planning an evaluation of your citizen training activities, the first question is "Where should I look for changes?"

In public school education, the changes we would look at are within the student—his ability to perform certain tasks (long division, map reading, cursive handwriting), state certain facts (boiling point of water, Spanish words for colors, plot of a novel), or explain certain events (causes of World War I, the reason why some cities have smog). In other words, evaluation would focus on the learner.

In "on-the-job training," an evaluator would look at the learner's knowledge or skills (ability to perform five basic operations with a drill press) but also at output (learner is able to produce 20% more widgets per hour). (In a public school setting, the "output"—the application of what has been learned—is often years away, and is therefore inconvenient to measure.)

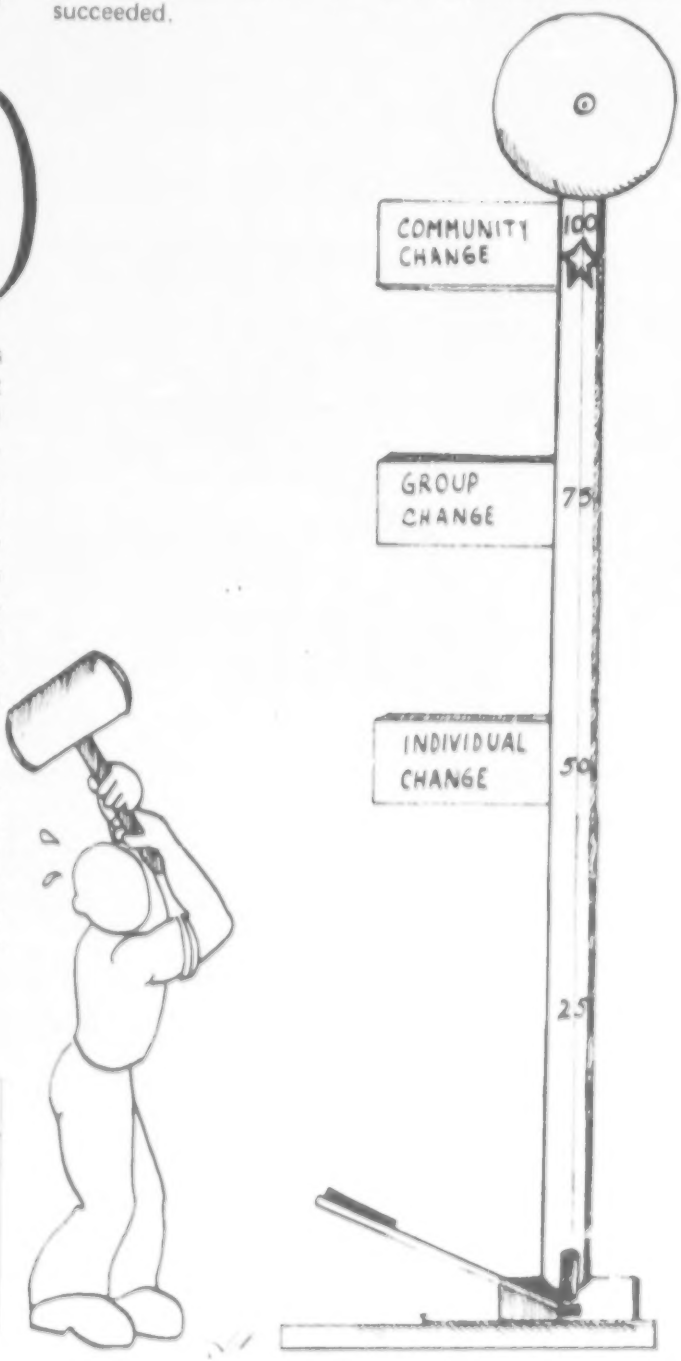
So where should we look for change as a result of citizen group training? It's possible to think of the training activity as a stone dropped in a quiet pool of water, producing at least three distinct ripples:


Training Activity
Individual Change (new skills, information, self-confidence, etc.)
Group Change (better meetings, clearer goals, more innovative programs, etc.)
Community Change (group output: goals achieved, social conditions improved, community needs met, etc.)

We would hope to create changes on all three levels as a result of a citizen group training activity. The first level, individual change, is the most direct—it will show up fastest and will perhaps be the most dramatic. After a workshop on writing press releases, members should be able to write an effective release, will understand what they need to do in order to have the best chance of getting their story into the news media, and will feel confident about their ability to succeed at these activities. Based on these **individual** changes, **group productivity** should change: more press releases would be written each year, perhaps of a higher quality than before, and there would be consistent personal follow up with editors or news directors to get the stories used by the media. **Community change** would depend on the content of the press releases, but might include: increased community awareness of the citizen group's activities and concerns, increased time and money devoted to those concerns, legislation passed or social conditions changed.

Training Activity	Individual Change	Group Change	Community Change
Workshop on writing press releases	Ability to write them; understanding of process for securing story; self-confidence	More and better releases; better follow up	Awareness of activities and concerns; time and money allocated; legislation passed; conditions changed

If you wrote learning objectives as suggested in Chapter 7, the individual changes you're after will probably be the learning objectives. (If you don't have any learning objectives in mind, now is the time to pin them down.) But unless you're content to have individual group members learn something new (anything!), you'll want to identify the group changes and community changes that you hope will result from training. The following exercise provides an opportunity to do that; the third step in the process anticipates our next topic: how to know whether you've succeeded.



Exercise: IDENTIFYING EXPECTED RESULTS

number of people: one to many
minimum time: 20 minutes
materials: copy of the form below

Process:

1. Identify a training activity (ideally, one which you plan to carry out); write its name in the appropriate box on the form. It's best to name a very specific activity rather than a broad topic.

2. Identify and list the results (changes, impacts) which you expect to occur because of the training activity. Use the three categories—individual change, group change, and community change—plus "other" if needed.

3. For each change expected, identify targets or criteria that will let you know that you've achieved the expected results. Example (based on press release workshop, above):

Group change—20 different press releases per year (compared to present rate of four per year)
—releases delivered to 100% of the appropriate media outlets
—at least 75% of the releases sent produce coverage
Community change—20% of the community knows about our group and its concerns
—25 new volunteers are willing to contribute time to our cause
—local officials sense public concern and give more support.

4. Don't be concerned at this point about the fact that some of these targets will be difficult to measure.

5. If you have other training activities in mind, use a separate copy of the form for each of them, repeating steps one to three above.

Training Activity	Individual Changes	Group Changes	Community Changes
	•	•	•
	•	•	•
	•	•	•
	Targets:	Targets:	Targets:
	•	•	•
	•	•	•
	•	•	•

Discussion Questions:

- *Are the changes plausible, considering the nature of the training activity being planned?*
- *Are the targets specific enough so that there will be no question about whether they have been reached?*
- *Is there such a thing as partial success—when something less than the target has been achieved?*
- *How soon after training do you expect the desired results to appear?*

One last point about where to look for changes: there are usually some results which you never foresaw. People may learn things from an activity which you didn't plan for; coffee-break conversations may lead spontaneously to important decisions about how the group should proceed. These serendipitous results may be good or bad; they are likely to be important, and should be included in any examination of results.

INDICATORS OF SUCCESS

You'll never know whether you're getting where you want to go unless you have specific targets or indicators. Exactly what they are depends on the sorts of change you expect.

1) Individual change—the targets will be behavioral objectives or performance criteria, as described in Chapter 7. When it comes time to carry out the evaluation, these targets can be incorporated into an examination, or participants can be asked for a subjective self-assessment—whether they **think** they can perform according to the criterion.

2) Group change—targets may involve increased quantity or quality of output (example: press releases, as above). However, the group change may involve shifts in the way a group spends its time; it may involve adoption of new or innovative practices, ranging from brainstorming to rotating leadership of meetings to use of the local cable television station, to lobbying at the state house. If innovative practices are introduced or recommended in the training session, then it's natural to ask whether they get used later in the life of the group. And if they get used once, will they get used again?

3) Community change—number of people reached and influenced is one obvious indicator, although it may not be easy to measure. It's even more difficult to assess how **much** people's opinions have changed, but that may be a target nonetheless. Ultimately, the question here is whether training has helped the group to become more effective at whatever it's trying to do—improve the quality of the environment, increase the number of low-cost housing units available, assure that there's quality health care for all, etc. If the group has targets for measuring its progress, then it can be hoped that training will speed the achievement of those targets.

There's another indicator of success which shouldn't be underrated—participant satisfaction. People generally know what they want from a training experience, at least in an intuitive way. If they're satisfied, self-confident and energized as the result of a training session, that's a pretty strong indicator that you're doing something right.

Participants can be asked for specific opinions—about particular parts of the training activity, about the trainer, about the materials used, about the activities selected. They can become partners with the trainer in assessing progress and making revisions in the training plan; they can be asked for suggestions about which parts of the training plan to modify and how.

Michael Chan

WHAT TO ASK

The essence of an evaluation is some means for gathering information—probably a list of questions. This section contains some specific examples and suggestions. You may want to use one of the samples or develop your own questions.

Reaction Form. The CITP often uses the Reaction Form on the next page; workshop participants are asked to complete it near the end of the session. At that time, it's too early to measure the group changes and community changes which may result. Therefore, the emphasis is on the participant's opinions, self-assessment, and suggesstions. Here is the thinking behind the specific questions (numbers correspond to the items on the reaction form):

Reaction Form

To help

To help us improve future training sessions, please complete the following questions and return this form to the facilitator before you leave. Thanks!

Title of Training Session: _____ Date: _____

1. Right now I feel

   ____ excited ____ confident ____ confused ____ tired

   ____ bored ____ angry other: _____

2. Describe your own effort or involvement: ____very great ____great

   ____medium ____little

   ____very little

3. What did you expect to learn at this workshop?

4. What is/are the most significant things(s) you learned today?

5a. In what ways did this workshop meet or go beyond your expectations?

b. In what ways did this workshop fall short of your expectations?

6. What changes do you feel might improve this workshop?

7. How did you hear about this workshop?

   ____ flyer ____newspaper ____ radio ____word of mouth

   other: _____

8. Based on your own expectations, what overall rating would you give this workshop? (1 = low; 10 = high)

   1 2 3 4 5 6 7 8 9 10

COMMENTS

1. **Participant feelings** as a gauge of the overall success of the training activity

2. **Level of involvement** in order to determine the average involvement level which the activity stimulated, and as a test of the old adage, "You only get out what you put in."

3-4. **Expectations and actual learnings**—Item 4 identifies things which were learned and which the learner considered significant. A comparison with item 3 indicates initial expectations which were and weren't fulfilled, thus indicating areas which need more attention in future workshops.

5-6. **Successes, shortfalls, and suggested changes**—Here the learner becomes a coevaluator and coplanner of future workshops.

7. **Publicity**—This item may be of interest if several channels have been tried.

8. **Numerical rating**—Less informative than the other items, but it does allow for comparison with other workshops.

Self-Assessment. Another approach to evaluation is to focus on the specific learning objectives of the session. An exam or quiz does that, but may stir up a lot of defensiveness and competitiveness within the citizen group; basically, we don't see this sort of testing as part of an egalitarian, "colearners" approach to training. Instead, we recommend self-assessment. Here is a sample format for such questions:

Several of the main skills covered in this workshop are listed below. To the right of each item, circle a number from 1 to 4 to indicate your estimate of your current ability in each area.

4 = more than adequate

3 = adequate

2 = less than adequate

1 = much less than adequate

Your answers will be used to plan future training activities. They are a test of the workshop, not of you!

A.	Ability to write a press release	4	3	2	1
B.	Ability to identify media outlets (radio, TV and newspapers) which should receive press releases	4	3	2	1
C.	Ability to respond confidently to a newsperson's call for additional information	4	3	2	1
D.	Etc.				

STOP PROCESS

In the middle of a training session, it may be desirable to find out how people are reacting. A "Stop-Process Evaluation" can accomplish just that. At any point in the session, the trainer asks everyone to stop what they're doing and to jot down brief answers to a few questions, which could be posted on newsprint. For example:

STOP-PROCESS EVALUATION

1) My energy level right now is_____ (one word).

2) The best thing that happened so far is_____

3) The thing I want to happen which hasn't yet is _____

Participants would answer on half-sheets of paper. The trainer or a helper would scan the answers and decide whether to modify the plan for the remainder of the session.

In a small group, short answers could be given verbally so that everyone would know how others are reacting. Obviously, many different questions could be asked, depending on the nature of the training activity, and participants could share directly in the decision whether to modify the plan.

FOLLOW-UP QUESTIONNAIRE

Whatever the timing or style of the evaluation, there are various types of questions which could be added. To tap the "group change" and "community change" aspects, one could develop a follow-up questionnaire (say, a month after) which might ask:

Since our workshop on using the media (May 22), have you noticed any changes in the way our group performs in the areas covered by the workshop?
( ) yes ( ) no
If yes, please specify:

OR . . .

Our workshop on using the media (May 22) included a number of specific skills and suggested procedures. Some of them are listed here. Indicate how well you think we're doing as a group in using each skill or procedure, by circling a number from one to four:

4 = use the skill or procedure as often as is appropriate
3 = use the skill or procedure some, but less than we could
2 = use the skill or procedure much less often than we could
1 = don't use it at all

- Method for writing a good press release 4 3 2 1
- Procedure for developing a log of mass media outlets in our area 4 3 2 1
- Brainstorm of strategies for communicating our concerns to the public 4 3 2 1
- etc.

AND . . .

Since the May 22 workshop, have you noticed any changes in the way our organization relates to the community? ( ) yes ( ) no . . . changes in our progress toward our goals in the community? ( ) yes ( ) no If yes (for either part) please specify:

Did these changes result from the learning which occurred at the workshop? ( ) yes ( ) no If so, how?

Selecting Questions. Many different types of question are possible. The best strategy is to examine the objectives and the expected outcomes of your training activity. Try to write a number of different versions—more questions than you could possibly use—and select the questions which seem most helpful and have the best chance of helping you decide what changes to make in your training plan.

One additional approach to evaluation uses questions found earlier in this manual. It involves going back to needs analysis (chapter six), since an updated needs analysis will tell you part of what you want to know: what topics now need attention (or more attention). The drawback of this approach is that it may not give sufficient detail about the skills or information which the workshop addressed; the strength is that it may tell you that participants know all they want to know about the skill-area in question, and are ready to move on to something else.

A final approach to evaluation might go by the name "unobtrusive measures." Often, answers to questionnaires or interviews are slanted according to what the respondent thinks is expected, so social scientists often try to verify their findings with measures which aren't subject to this sort of bias. Unobtrusive measures are, by definition, those which do not require an interview or even the conspicuous presence of an observer. They could be used during a workshop or during activities of the group later on. Examples: attendance at meetings after the workshop (compared with before), noise level within discussion groups, rate of volunteering for special responsibilities, etc.

WHEN TO ASK

There are several possible times to evaluate: before training starts (as a basis for comparison), at the middle of a workshop session, at the end of the session, at the end of a series, several weeks or months later when group and community change can be assessed. Each has its purposes.

Educators are prone to group evaluations into two types: **formative evaluations**, which occur during a training activity or series (to help form the remainder of the training), and **summative evaluations**, which occur at the end of the training to sum up the outcomes. Formative studies are directed toward possible changes in the training plan, whereas summative evaluations are prone to emphasize the results of training. However, the end of one training series may be the beginning of another, so a summative evaluation of one series may help form the next.

When you conduct an evaluation depends on how eager you are for formative information and how long you think it will take for results to surface (or fade away!). You may need to take a before-and-after approach in order to be able to have a base-line against which to measure changes. The following exercise, reprinted from CITP's manual, **Planning, for a Change**, reviews the issue of timing as well as information-gathering method and the general type of information you're after. It would be useful when you're first planning an evaluation, and before you invest a lot of time in developing specific questions.

What Would an Evaluation of "The Event" Look Like?

no. people: one to several
minimum time: 8 minutes
materials: form below

Suppose the planners wanted to find out how successful an activity was/is. Listed below are several different ways of designing an evaluation. How the evaluation is conducted usually depends on the decisions/information needed, the size and scope of the project and the energy and resources needed to conduct the evaluation.

1. Working individually, select one or more items from each column. Check these items you've selected (2 minutes).

2. Each person then shares his preferences in small groups, stating why the items were chosen (6 minutes).

What kind of information/ data do you need to collect?	How would you do the evaluation?	When would you do the evaluation?
☐ *Behaviors*	☐ *Interviews*	☐ *Before and after*
☐ *Feelings*	☐ *Comparison group (people who didn't attend the event)*	☐ *Three weeks after*
☐ *Participation in activities*	☐ *Questionnaire*	☐ *In the middle*
☐ *Attendance*	☐ *Observation*	☐ *At the end*
	☐ *Documents (videotape, newspaper articles)*	☐ *Other*
	☐ *Physical evidence*	
☐ *Noise level*	☐ *Personal diaries of those who attended*	
☐ *Other*	☐ *Tests (attitudinal, values, etc.)*	
	☐ *Ratings by planners, those who attend, and "professional party goers"*	
	☐ *Other*	

WHAT TO DO WITH THE INFORMATION YOU GATHER

An evaluation does no good if you sit on the findings. First of all, it's necessary to summarize the results—average the numerical scores, list and group the significant learning, list the suggested changes, sketch a flow chart of impacts—whatever it takes to understand and remember what the information says.

Decide what changes are needed in your training plan.

Second, decide whether changes are needed in your training plan, and what they might be. Third, decide who else should know the results. Perhaps some doubting group members or a sponsoring agency need to be impressed with successes; perhaps the participants need to know that they shared a perception about weak points, or what needed to happen next. And who should participate in designing any modifications to the learning plan? When are you going to make those decisions? If time hasn't been scheduled for a future training session, when will it be?

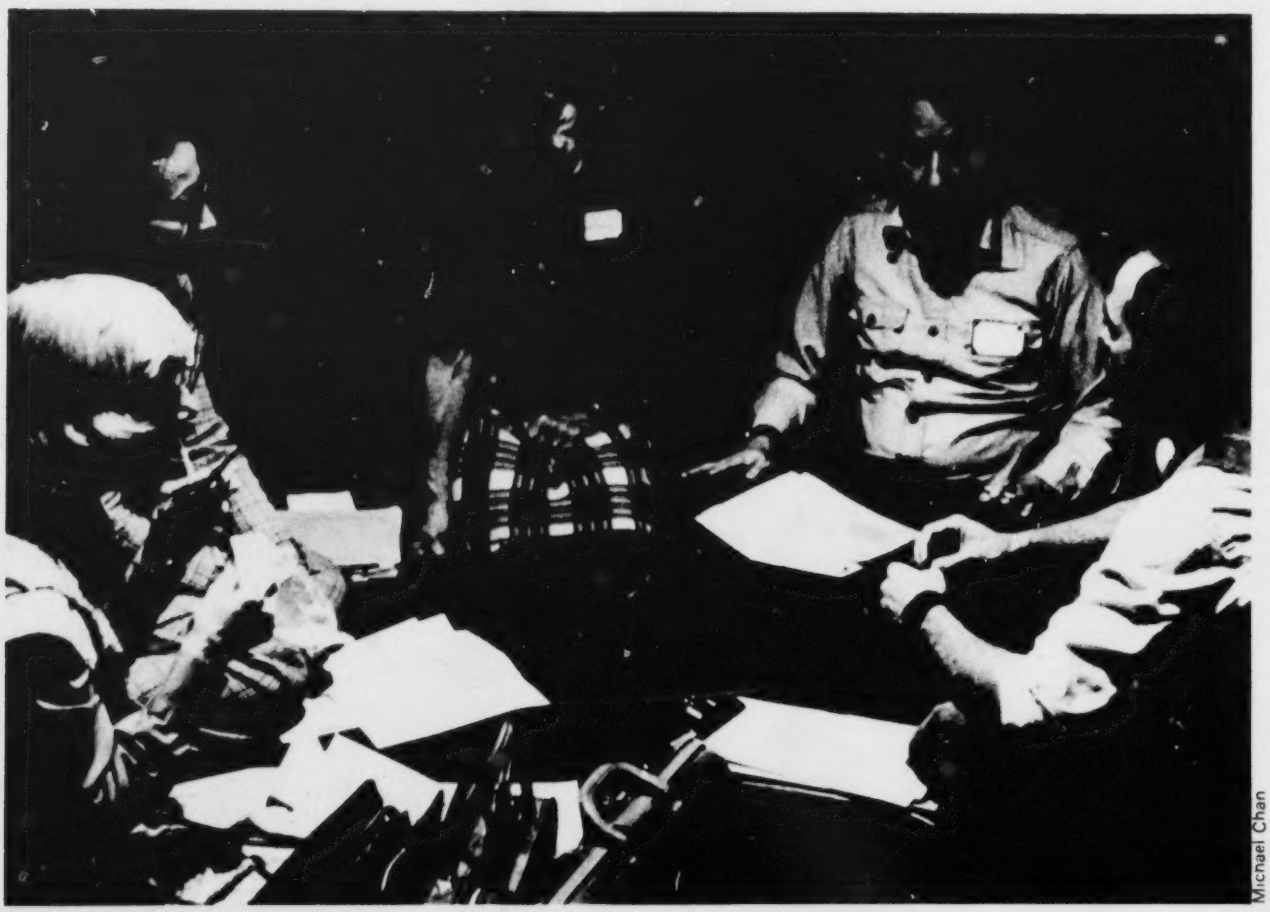
In short, if there are changes to be made, go to it! If your training session was a success, go celebrate!

14 THE TRAINER AS LEARNER

So far, the learners we have been concerned with are the citizen group members, and the training objectives have been to meet the learning needs of the members. In the last part of this manual we encourage you to shift your focus—to think about yourself, the trainer or training coordinator, as the learner. You have been reading this manual; what **other** steps can you take as part of an on-going plan to increase your abilities as a trainer?

As training coordinator you need to be a learner in two senses. You need to be a co-learner with other group members (whether or not you are more advanced than most of them)—sharing fully and equally in the learning experiences you have helped to create, and seeing things as the other group members see them. And you also need to keep learning and thinking about how to do training better. (If success turns your head, you're facing toward failure.)

Learning to be a better trainer can take on several focuses. You may want to explore the **methods** of training and adult education, to become more skillful at planning and carrying out different types of learning activity. Or you may want to explore the **content** that could be useful to your group, perhaps by attending conferences or scanning printed matter to find the ideas and procedures that will address your group's needs. The activities in this part are designed to help you think through those options and develop a learning plan that will work for you.



Michael Chan

Exercise:
SELF-ASSESSMENT AS A TRAINER

number of people: one to many
minimum time: 20 minutes
materials: pencil, form which follows

This activity is designed to help you reflect on your abilities as a trainer, to identify those skills and attributes for which you deserve special appreciation. It also will help you take a realistic look at the areas which are your primary targets for improvement. There are some open-ended questions and then a list of skills and behaviors for your self-rating.

Process:

1. Answer the questions and rate the skills on the form which follows.

2. Find someone to discuss this with. It could be a trainer from another group, a member of your own group, or a friend. Ask them to listen as you think out loud about where you stand as a trainer. However, this helper should be sure to do three things:

- Make sure you give yourself all the credit and appreciation you deserve for your strengths.
- Make sure you don't get too down on yourself about the skills that need improvement, or the difficulties you have experienced.
- Make sure you identify a reasonable (small) number of areas which you want to work on first.

1. What are the personal strengths that you bring to the role of facilitator?

2. If you have planned or led a citizen training activity, or helped individual group members acquire skills or knowledge:

a) Think about what went well in that process; jot down the things you did that contributed to the success.

b) Think about a part of your training experience that didn't go as well as you hoped it would; jot down the things you think contributed to the difficulty.

On this page is a list of skills and behaviors which an ideal trainer might possess. You might want to review the list and add any others which occur to you; space has been left for this at the end of the list. Then rate your abilities as a citizen group trainer, using the following code:

1 = no improvement needed
2 = little improvement needed
3 = considerable improvement needed
X = not a necessary skill or behavior in this situation

ability to . . .				
1. help the group identify its training needs	1	2	3	X
2. state learning objectives that are also relevant to group needs	1	2	3	X
3. help the group establish learning priorities and set achievable targets for learning	1	2	3	X
4. help the group develop a commitment to training	1	2	3	X
5. help the group develop a vision of what it could do as a result of training	1	2	3	X
6. familiarity with different methods for citizen group training (discussion, problem solving, simulation, etc.)	1	2	3	X

ability to . . .

7. identify several learning activities to achieve a particular learning objective	1	2	3	X
8. select the activity which seems potentially most effective in the situation	1	2	3	X
9. select activities that are suited to the current skill or experience level of participants	1	2	3	X
10. develop an effective sequence of learning activities	1	2	3	X
11. find or create an appropriate physical setting for training	1	2	3	X
12. clarify the purposes of a particular workshop or learning activity	1	2	3	X
13. generate a shared commitment to learning	1	2	3	X
14. create a suitable tone or "climate" for learning, (relaxed, safe, supportive, etc.)	1	2	3	X
15. present information clearly and concisely	1	2	3	X
16. give instructions for activities clearly and concisely	1	2	3	X
17. lead simulation or role-play activities	1	2	3	X
18. lead problem-solving or creative-thinking activities	1	2	3	X
19. ask easily understood questions	1	2	3	X
20. ask thought-provoking questions	1	2	3	X
21. answer questions clearly and concisely, when appropriate	1	2	3	X
22. overall effectiveness as a discussion leader	1	2	3	X
23. **ability to** get people involved in discussions	1	2	3	X
24. facilitate discussions **among** participants rather than between a participant and the trainer	1	2	3	X
25. willingness to explore a variety of points of view	1	2	3	X
26. make participants aware of the value issues involved in the subject matter	1	2	3	X
27. state personal values without imposing them on the participants	1	2	3	X
28. relate to participants in a way which promotes mutual respect	1	2	3	X
29. creativity in the design and facilitation of learning plans	1	2	3	X
30. use a variety of group sizes and settings	1	2	3	X
31. flexibility in responding to the interests and emerging needs of the learners	1	2	3	X
32. inspire excitement on the part of the learners	1	2	3	X
33. **ability to** take appropriate action when participants appear to be bored	1	2	3	X
34. relate learning activities to the real world situations which the group faces	1	2	3	X
35. **ability to** create means for participant evaluation of the learning activities	1	2	3	X
36. utilize evaluative comments to revise the training plan	1	2	3	X
37. help individual learners plan and carry out self-directed learning activities.	1	2	3	X
38. other: _____	1	2	3	X
39. other: _____	1	2	3	X
40. other: _____	1	2	3	X

(Format and some items adapted from TABS (Teaching Analysis by Students), developed by the Clinic to Improve University Teaching, University of Massachusetts.)

After you have rated your ability on these skills and attitudes, go back through the list and identify the two or three items you think most important to improve. If you have evaluations of workshops you have led, they can help you choose. Don't be alarmed if you have a lot of areas that need improvement—so do university professors and a lot of other professional educators! The important thing is to decide where you need improvement most, and develop a plan for learning and action to do something about it. The next two sections will give you suggestions.

If you carried out the previous exercise, you now have several skill-areas targeted for improvement. You could set some learning objectives for yourself and create a learning plan for acquiring the skills, or you could decide what you'll do differently next time you lead a workshop. (Or you could do both.) For now, let's look at the second possibility—taking immediate action for better training. The following exercise asks you to choose a particular skill-area, analyze the problem, and identify steps you can take the next time you are in a similar situation.

Exercise: TAKING ACTION FOR BETTER TRAINING

number of people: 1 to many
minimum time: 20 minutes
materials: pen, form below

Process:

1) Identify the skill-area you want to work on. You will probably want to take it from the top priority items from the previous exercise. Write it in the first box.

> Example: ability to use a variety of group sizes and settings.

2) Think about the source of the problem. There may be several different reasons you are having difficulty. Jot down your thoughts in the second box.

> Example: I feel more in control of things when I'm working with the whole group at once. I need to work at planning activities that smaller groups can do on their own, giving clear instructions for those activities, and then seeing what happens.

3) Decide what you will do about the situation, and when. Write your commitments in the third box.

> Example: For the workshop next month, I will plan some pair and small-group activities. I will check the learning plan to be sure that participants have the needed background information to work independently, and I will make some notes to be sure that I give complete instructions.

4) Decide how you will know that you've resolved the difficulty. Write your answers in the fourth box ("Indicators").

> Example: I will know I'm on top of this one when I've completed a workshop which has varied groupings and when I (and the participants) feel it has gone well, had enough structure and clarity, and produced good active learning.

5) Decide whether there are learning activities you could undertake as a trainer, which would help you deal even more effectively with the skill or behavior in question. Make some notes about them in the fifth box.

6) Find another trainer, a group member, or a friend to help you think through what you have planned. (Better yet, have this helper around to listen as you think your way through this whole exercise.) Decide whether you've squarely addressed the problem, and whether the action you've decided on is something you feel confident about carrying out.

1) Targeted skill area: _____

2) Source of the problem: _____

3) Action planned: _____

4) Indicators of success: _____

5) Learning activities that would help: _____

A LEARNING PLAN FOR THE TRAINER

Some self-improvement goals can be addressed directly by deciding on a course of action and pursuing it. However, some improvement goals will first require a learning program for the trainer, in order to acquire training skills or identify information or procedures that will help the group move forward.

Learning is a very natural response for most people when confronted with new or difficult situations. But the most effective learning occurs when there is some thought about the objectives, the methods, and the resources which will be used. This is as true for the trainer's own learning as it is for the citizen group members.

Here are some of the learning activities which may be productive for the trainer:

- **Attend workshops and training conferences** as often as possible. Observe carefully; identify training styles and procedures to emulate. When the content is appropriate, bring specific activities back and use them in one's own organization.
- **Read.** Printed materials on adult education theory and practice are described in the annotated bibliography at the back of this manual. Books and other materials on the content areas that citizen groups may need help with are cited in the bibliographies of the other CITP manuals, and most of those references have their own bibliographies as well.
- **Find helpers.** Professional trainers can be brought in to work with a citizen group, depending on the group's ability to pay and the professional's willingness to negotiate a fee which is within the group's ability to pay. Once a professional has joined the team, the trainer within the group can learn by observing how the outside trainer plans and carries out training activities. Better than that would be a partnership approach in which the outside trainer and the "within-the-group" trainer work together every step of the way.
  Other helpers might include trainers from other citizen groups, local university or community college faculty members (business, sociology and social psychology departments are likely places to start), Cooperative Extension service agents, other members of your own group and, as we've said before, friends, spouses, and other local citizens. These people might be recruited to help you plan and carry out training, listen to your planning and observe your training, share their own experiences with training or citizen group work, etc.
- **Apprentice** with a more experienced trainer or a citizen group that is dealing effectively with your group's issues. Learn how they do what they do, bring it home, and share it.
- **Identify difficulties,** set improvement objectives, develop strategies for improvement, try them out, and revise your strategies if necessary. (This is the approach spelled out in the previous section.)
- **Do lots of training!** It's the plan-act-reflect sequence, the same sequence which is at the basis of much of our human learning. If at first you don't succeed, think it through, then try again with another approach.

What can you do to get the most out of these learning activities? The same thing this manual encouraged you to do to help a citizen group with its learning—identify needs, set objectives, generate some alternative methods, draw in resources when appropriate, select the most promising activity, do the learning, and evaluate to see whether you've met your objective. The worksheet which follows will help you remember and use these steps. (Use a separate worksheet for each training need you have identified as a personal priority.)

WORKSHEET: THE TRAINER'S LEARNING PLAN

1) Initial sources of training need (a forthcoming task, a problem or difficulty, a skill area identified as a priority in the exercise in Chapter 12)—

2) Revised statement of training need (skill, information, concepts, understanding, etc. which are sought)—

3) Objectives ("I, the trainer, will be able to . . .")
General objective—

Specific objectives—

4) Possible training activities—

*Most promising

5) Resources available—

*Plan to use

6) Schedule for carrying out the learning plan—

7) Method for assessing results (and comparing them with objectives)—

You may need to use a separate copy of this worksheet for each training need that you have identified as a personal priority. You may find it helpful to sit down with a friend (perhaps another member of your group) and make a verbal commitment to the training plan which you outline on the worksheets. The friend could agree to check back at a future date to see how you're doing.

FINDING ALLIES

Previous sections have mentioned a variety of people who might be called upon for encouragement, advice, opinions, a listening ear, or even a full-fledged partnership. Here we'd like to propose an additional channel for you to use in tapping their help—the trainers' support group.

A support group could get started by one trainer or training coordinator who learns she has a counterpart in another local group and calls him up. Perhaps through the local newspaper or the grapevine, they discover that there are five other citizen group members in town who have formally taken on responsibility for training, or who are especially concerned about skill building. The seven of them decide to get together and, based on the amount they have in common, decide to meet on a regular, monthly basis.

Here are some things a support group might do.

- An open discussion—training needs and methods, "How's it going in your group?"
- The activities in this manual—many of which can be carried out by one trainer alone but can be more productive if there are people to participate in discussion.
- Trouble shooting—what's not going as well as you would like and what can be done about it? This would resemble the case study discussions which medical and counseling teams hold to increase their insight and skill.
- Workshops—trial runs of workshops by one member or by an outside resource person on a topic of interest to several of the groups represented.
- Resource Bank—compile an inventory of skills and resources by collecting and sharing individual and organizational resumes, library lists, etc.

In addition to these five types of activity, which would occur at the support group meetings, there are several other possibilities for collaboration:

- Observation/feedback—a trainer would invite one or more support group members to observe a training session she is offering for her own group. The observer(s) would provide feedback and suggestions afterward.
- Joint training—a trainer would invite one or more support group members to work with her to plan and carrry out a training activity. The favor might be returned in kind. Support group members might begin to specialize, leading training sessions for other groups on the topics they knew best. And if more than one group had an interest in a particular topic, combined workshops (or open community workshops) could be held.

A trainers' support group could be as small as two people, meeting occasionally over lunch, or regularly for intensive work sessions. It might be as large as 10 or 12; to find this many trainers in one area might require a broad definition—organizers, officers, and also academic types with an interest in community education could be included. A group much larger than 12 would be unwieldy for the purposes described.

Because a trainers' support group could serve a variety of purposes, it is important for members to start by sharing their hopes and expectations for the collaborative effort. The ideas in the previous section for planning a learning program for the individual trainer can be applied on the group level, so that the trainers' group would have a set of learning objectives and activities in mind for itself.

Discussion Questions:

- *Would it be useful to you to have one or more individuals who would directly assist you in your training activities?*
- *What kind of help would you like?*
- *What steps could you take to get that sort of help?*
- *Would a trainers' support group as described above be useful to you (now, or at some point in the future)?*
- *What would you like to get from a support group?*
- *What steps could you take to start one in your area? What help would you need to get it started?*

15 THE TRAINER AS A PERSON

The underlying message of the last few sections has been that every trainer has some room for improvement. But no matter whether you are an experienced old hand at training or a total novice, you have some important assets which you bring to your group and its training activities. One training asset is your commitment to training—your interest in seeing your fellow citizen activists become more powerful and more effective in achieving their goals. This is something you shouldn't be shy about; you may very well have the clearest vision of what your group could become and some of the steps that are needed to get there. Don't hide that vision or be afraid to restate it!

Your other major asset is who you are as a person. You may find you're a bit nervous as you try on the role of "advocate for training" or as you lead your first workshop. What will get you through is not a retreat into cool, "objective," or authoritarian behavior, but a willingness to show people who you are, complete with feelings, mistakes and frustrations. The more you allow yourself to **be**, to feel, and to express yourself as a person, the more likely is the group's acceptance of your new role. Your visions of your group achieving its full potential is a very human and compassionate ideal; with that as a starting point, you don't need to worry about letting the group see who you are.

At some of its workshops, CITP asked participants to brainstorm attributes of a good facilitator. Here are some of the replies:

- "Human"—sincere, open, empathetic.
- She acts "herself" and doesn't attempt to "act" in predefined ways.
- Honest, genuine and believable.
- Consistent; showing congruence of word and action.
- Willing to train by example, using herself as model in the group to set the tone, break the ice, take risks, exhibit respect and appreciate, or demonstrate a willingness to say "I don't know and I want to learn."
- Not on a "power trip"; behaves as an equal in the learning process.
- Committed to the learning and the well being of participants.
- Self-confident; able to enjoy successes and to appreciate herself as a person and a trainer.
- Flexible and creative.
- Warm sense of humor.

If that's all starting to sound like an impossible order, let us provide you with some room for error; consider this one:

- The facilitator is human, and thus may get nervous and/or make mistakes. She must be able to laugh, to admit her errors and express her feelings, and to ask for help from the group in correcting any blunders or relieving tensions.
- Finally, the trainer is genuinely enthusiastic and committed to the topic and to the participants.

You may want to add some other points:

-
-
-

THE TRAINER'S VALUES

Being fully human in the trainer role means, among other things, sharing your values openly and forthrightly with the members of your group. Many people wonder if it is right to impose their values on the group. Not impose, perhaps, but raise issues and clarify your own positions.

Public school social studies teachers generally did their best to avoid controversy. Being on the public payroll, they were, and are, prone to try to please all the people as much of the time as possible. Too often, that has meant avoiding issues like racism, sexism, or economic injustice. Values which were widely supported in a community were upheld in the classroom, and were often passed along without much conscious or rational discussion—communism is the enemy, capitalism is the democratic approach to economic order (even monopoly capitalism and modern multinational capitalism); even some of our questionable but "American" institutions like the electoral college may have crept by unchallenged. The status quo was generally supported, whether by the teacher's intent or by avoiding controversial discussions.

As Stokely Carmichael says, "If you're not part of the solution, you're part of the problem." When you make recommendations to a group about how to spend its training time, you are inevitably in the position to raise or omit value questions. Reflecting on our values, here are some of the issues we hope you will decide to raise:

- existence of role stereotyping and discrimination on the basis of sex, race, age, religion or ethnic background in the society at large and within citizen organizations.
- economic injustice: the lack of equal opportunities for jobs, housing, education, health care and other necessities, which we see as being caused primarily by the current economic structure.
- economic injustice on an international scale: the role of multi-national corporations in perpetuating unequal access to the world's resources and in guiding third world development in directions which are often more beneficial to the corporations and the developed world than to third world peoples.
- the need for long-range planning by citizens which deals with the issues just stated and builds positive images for the future and strategies for achieving them.

Here are some suggestions for raising value-laden issues within your training sessions:

1) Raise these issues squarely so everyone can understand the nature of the debate and participate in it.

2) Raise such issues as early as possible in the training sequence, but after enough trust has developed to result in honest statements of opinion.

3) Use discussion, role play, problem solving—whatever method seems best suited to the issue at hand.

4) It may be necessary for you to raise questions without stating your own values at first, in order to set a tone of openness to all positions

5) Be forthright in stating your own values, even to the point of making statements such as the following:

"I think this group would be in the wrong if it . . ." if that's what you believe. Be clear that you're stating opinions, rather than facts; some people will be prone to project a "rightness" on what you say, just as they did with their teachers. But as an equal group member, you are entitled to state your opinions clearly.

6) The most effective moments for raising value issues cannot be preplanned. Be on the alert for the moments when these questions are being raised spontaneously, and be courageous in making the questions explicit and pushing for clarity and resolution.

A citizen group may have all the skills in the world—in fund raising, communications, effective meetings, planning, organizing, lobbying, etc.—but if it doesn't have answers to the basic value questions, then it doesn't much matter how capable it is.

REASSESSING YOUR COMMITMENT

Before you started reading this manual, you undoubtedly had some personal interest in training. Perhaps you were an experienced trainer—or perhaps a novice, a concerned group member wondering how training could help your group.

Wherever you came from, where do you stand right now? Consider these questions:

- What role do you see for yourself in your group's training?
- What steps do you plan to take over the next few months to carry out that role?
- Whose help will you draw on?
- What plans do you have to increase your ability as a trainer?

We live in a time of rapid change. Our governmental institutions are evolving with the times, and to keep pace, our means of citizen involvement need to evolve too. Citizen group members need information and skills in order to be effective in the arena of large bureaucracies and of corporate decision making. Their success depends in large part on people like you who can envision their groups as more effective than they are now, and can envision some steps to help them **become** more effective. We hope this manual will help you in that effort. Write and let us know how you're doing. And good luck!

Michael Chan

GLOSSARY

The terms presented here are commonly used in the field of training and adult education. This glossary is an attempt to capture the flavor of the different terms and to shed some light on the various approaches to adult education which they represent.

active learning—learning by doing, by problem-solving, simulation, role play, or some other activity which involves the learner in a role other than that of listener and absorber of information.

apprenticeship—an active learning method suitable for the acquisition of physical skills (as in the trades and crafts) and also of judgment and process knowledge.

banking—passive learning, in which the teacher views the student as a depository for information. The term is used (in a derogatory way) by Paulo Freire.

capacity-building—the development of capabilities; whereas skill-building connotes physical skills, capacity-building incorporates process-knowledge and cognitive abilities as well.

community development—an approach to community problems that emphasizes the development of problem-solving capabilities as well as the resolution of immediate problems. Compare with **community organizing.**

community organizing—an approach to community problems that emphasizes the most rapid and efficient resolution of problems. Almost always, community organizing involves elements of capacity-building or citizen training; the distinction between community organizing and community development is, in actual practice, a matter of degree, not either/or.

competency-building—capacity-building.

diagnostic—the analysis of training needs and the specifying of objectives through discussion, questionnaires, or some other method.

dialogue—an approach to learning based on discussion and problem-solving among educators and learners. Paulo Freire, in his use of the term, emphasizes the importance of an egalitarian relationship among participants in dialogue, if it is to be an effective learning method.

education—the broadest term for the act or process of learning. May connote structured, institution-based, or teacher-directed learning processes; see **schooling.**

facilitating—a style of educational leadership which emphasizes the creation of settings or environments for learning, rather than lectures. Compatible with active learning, dialogue, and problem-solving.

human resource development—a euphemism for education or training which is built around the notion that people, and their potential abilities, represent a social resource that deserves to be developed to its fullest.

indoctrination—education verging on brainwashing. The imposition of the educator's values on the learners.

individualized learning—learning in which activities are suited to the particular needs of each individual. Independent study is usually individualized, especially if it is self-directed (rather than correspondence courses). Group learning may be individualized by developing different learning activities as appropriate for each learner, or by arranging for learners to undertake the same sequence of activities at their own individual rates.

information-sharing—the communication of information among coequal learners; an alternative to information dissemination from one source to a group, and much more appropriate if the needed information is held by many individuals.

learning—the process of acquiring new information, process-knowledge, capabilities, skills, attitudes, etc. The connotation of the word is more student-centered than education or teaching.

learning activity—any activity which results in learning, whether it be reading, writing, listening to a lecture, solving a problem, acting and reflection on that action, etc.

learning environment—the physical and psychological setting in which learning takes place. May also refer to a situation which is rich in stimuli, information, and potential learning activities.

motivation—within the context of education, motivation is the desire to learn. A crucial element in success. Whereas the traditional teacher focuses attention on the information to be transmitted (largely by lecture), it may be more appropriate to focus attention on the development of motivation, perhaps through role-play, simulation, problem solving, or some other approach which builds a link between the learning situation and the real-world context in which the learning will be applied.

on-the-job training (OJT)—learning to perform a job through the experience of doing it. May be augmented by constructive criticism from supervisors, a formal apprenticeship, or actual classes. Citizen action training may be seen as OJT; it shares with work-related OJT the advantage that there is no time-lag between learning and its application. Motivation tends to be high.

organizing—see community organizing.

orientation—a special program of information and skill-sharing, which may be helpful to new members of an organization.

paideia—ancient Greek concept of the community and the culture as the source of education. See "Reality as the Classroom," page 24 in this manual.

passive learning—learning with a minimum of active participation by the learners. See banking; opposite of active learning.

professional development—on-the-job training for professionals, which may take the form of seminars, discussion groups, individual reading or problem-solving, apprenticeships, or the thoughtful processing of experience.

schooling—education which takes place within the setting of the public schools. Often used in a derogatory way to connote passive learning (banking), predetermined content, and lack of learner control over the learning situation.

self-directed learning—see student-directed learning.

setting—see learning environment.

skill-building—learning directed toward the acquisition of physical abilities (dribbling a basketball); cognitive skills (long division); or, by extension, process-knowledge. See Chapter 8 of this manual, Groups 2 and 3.

skill-sharing—development of skills within an organization through a process in which all participants are recognized as potential teachers, able to share the skills they have. Compare with information-sharing.

student-centered learning—learning which is typified in its planning and implementation by a concern for what the learners (rather than the teacher) will be doing, and what activities are most appropriate as the next steps in their development. May be individualized learning; almost always will be active learning.

student-directed learning—learning in which the learner takes primary responsibility for goal-setting and planning; may often be independent or individualized learning, but can operate in a group learning context through democratic or consensus techniques for determining goals and activities.

training—may involve the acquisition of skills within an authoritarian context, but the term is used in this manual more in the spirit of "spring training" by the baseball teams: preparation for a specific set of activities.

RESOURCES

This annotated bibliography presents materials which we think will be of use to the citizen group trainer. The topics it covers are:

- Adult Education Theory and Planning
- Training—Practical Guidebooks
- Training—Activity Sourcebooks
- Organizations
- Sources of Print, A-V & Gaming Materials
- Professional Journals & Associations

For additional resources pertaining to specific training topics, see the resource sections in the other CITP manuals.

Some of the books listed here are expensive or out of print. They can generally be found at major public or university libraries, or through the interlibrary loan service which is offered even at small libraries.

ADULT EDUCATION THEORY AND PLANNING

Education and Experience

John Dewey
Collier Books, 1938

The best of Dewey's writing on education; focuses on learning as the processing of immediate experience through a problem-solving process.

Pedagogy of the Oppressed

Paulo Freire
Seabury Press, 1970, $3.95

Freire's theory of education for personal and political liberation. A modern classic; difficult but important reading.

Education for Critical Consciousness

Paulo Freire
Seabury Press, 1973, $2.95

More of Freire's analysis, plus a presentation of the method he used with Brazilian Indian peasants to teach literacy and dialogue skills and to develop critical consciousness.

The Design of Education

Cyril O. Houle
Jossey-Bass, Inc., 1972, $13.95

Presents a systematic approach to the planning of adult education, illustrated by case examples. Appropriate concern for the human dimensions of planning, such as how the adult learner integrates learning with other life activities.

A Trainer's Guide to Andragogy

John Ingalis
U.S. Department of Health, Education, and Welfare, 1972
Available from U.S. Government Printing Office, Washington, D.C. 20402. Order No. H 17.8 An 2/973.

Presents a theory of adult education; explains the role of the trainer and gives an organizational model for adult training.

How Adults Learn

J.R. Kidd
Association Press, 1973, $16.95

A popular text on adult education theory, with special attention to learning environments and motivation.

The Modern Practice of Adult Education: Andragogy vs. Pedagogy

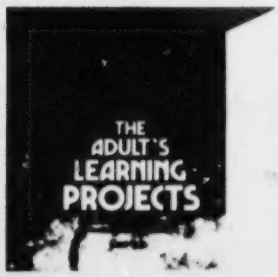
Malcolm S. Knowles
Association Press, 1970, $12.95

Written for adult educators, professional and volunteer, who work in organized adult education programs, community centers, civic organizations, etc., the book is equally useful in structured programs or informal, on-the-job training such as a citizen group might develop. The central concept is "andragogy" (the practice of teaching adults) as distinguished from pedagogy (the root **peda-** means child). Effective adult learning need not resemble the learning we have done as children, but should utilize methods which provide for sharing of past experience and the opportunity to develop and apply new learning in a participatory and realistic setting. Theroretical background is combined with sample forms, curricula, and planning guides.

Self-Directed Learning: A Guide for Learners and Teachers

Malcolm S. Knowles
Association Press, 1975, $4.95

Explores the role of leaders and learners and the use of learning groups to support self-directed learning efforts.



The Adult's Learning Projects

Allen Tough
Ontario Institute for Studies in Education
252 Bloor St. W., Toronto 5, Ontario, CANADA 1971

This book documents the extent of individualized and self-directed learning as a response to various life-situations. Almost every adult plans and undertakes learning projects. Learning facilitators can assist at various points in the process, including planning and the identification of resources.

Basic Principles of Curriculum and Instruction

Ralph W. Tyler
The University of Chicago Press, 1949, $2.95

A classic in educational curriculum planning. Stresses that planning should proceed from a clear statement of purposes, which should be based on an understanding of the content and an examination of the learners' and the society's needs.

Goal Analysis

Robert F. Mager
Fearon Publishers, 1972, $3.95

A practical guide for writing useful goal statements, with examples from the field of education. Includes sections on recognizing fuzzy statements, rewriting in observable terms, and testing for adequacy and completeness. Very readable.

Preparing Instructional Objectives

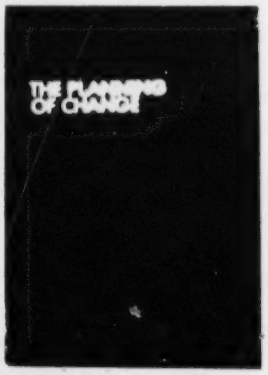
Robert F. Mager
Fearon Publishers, 2nd ed., 1973, $4.25

Applies the same practical approach as **Goal Analysis** to the setting of specific, observable learning objectives.

The Creation of Settings and the Future Societies

Seymour B. Sarason
Jossey-Bass, 1972, $13.95

Helps educators and other change agents to understand their potential role as the creators of social settings which can produce growth and change.



The Planning of Change

Warren G. Bennis, Kenneth D. Benne, and Robert Chin
Holt, Rinehart and Winston, 3rd ed., 1976, $13.50

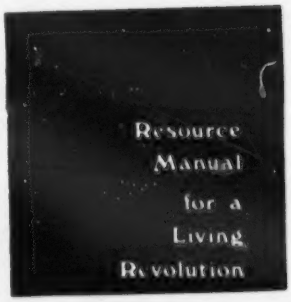
Collected readings in the theory and practice of social change. Helps the trainer to understand the interplay of training and other strategies for bringing about change within the group and the larger society; promotes a systems theory perspective as the basis for designing change strategies.

TRAINING — PRACTICAL GUIDEBOOKS

Resource Manual for a Living Revolution

Virginia Coover, Ellen Deacon, Charles Esser, and Christopher Moore
New Society Press, 1977
Available from Movement for a New Society, 4722 Baltimore Ave., Philadelphia, PA 19143, $5.50

Excellent companion volume to **Beyond Experts**; contains a section on designing and conducting workshops, plus specific ideas about consciousness raising, developing a social-change theory, group dynamics, meeting facilitation, personal growth, conflict resolution, support systems, and organizing. Numerous training activities and guidelines for their use.



Training for Change Agents: A Guide to the Design of Training Programs in Education and Other Fields

Ronald G. and Mary C. Havelock
Center for Research on the Utilization of Scientific Knowledge, Institute for Social Research, The University of Michigan, 1973, $10.00

Sample plan for the training of trainers, with a review of the underlying theoretical principles from education and social psychology.

The Change Agent's Guide to Innovation in Education

Ronald G. Havelock
Educational Technology Publications, 1973, $12.95
Englewood Cliffs, New Jersey

Although developed for use in the field of education, this book will be useful to people working for change within their citizen group or community. It covers diagnosis, resource acquistion, generating solutions and selecting the best of them, gaining acceptance for an innovation and stabilizing it. There are case studies and an annotated bibliography.

Discovering Your Teaching Self: Humanistic Approaches to Effective Teaching

Richard Curwin and Barbara Fuhrmann
Prentice-Hall, 1975, $6.95

An experiential text that helps people explore their values and style in relation to teaching.

A Manual for Group Facilitators

Brain Auvine, Betsy Densmore, Mary Extrom, Scott Poole, and Michel Shanklin
Center for Conflict Resolution, 1977, $3.00
Available from CCR, 731 State Street, Madison, Wisconsin 53703

A trainer's guide, with an introduction to facilitation, sample exercises, and guidelines for their use. Includes sections on facilitating films, problem-solving, conflict resolution, and crisis intervention. Helpful suggestions on evaluation and "what can go wrong in a training session and what to do about it."

Successful Conference and Discussion Techniques

Harold P. Zelko
McGraw-Hill, 1957, $3.50

Emphasizes group discussion fundamentals; contains aids for program planning and discussion leadership.

Planning, Conducting, and Evaluating Workshops

Larry Nolan Davis and Earl McCallon
Learning Concepts, Inc., 1974, $9.95

A readable and useful guide to the art and science of conducting workshops. Similar in many ways to this CITP manual but without the focus on citizen group training and with greater detail on some aspects of workshop planning and implementation. Good sections on specifying learning objectives, selecting methods, rehearsing and logistics.

How to Plan and Conduct Workshops and Conferences

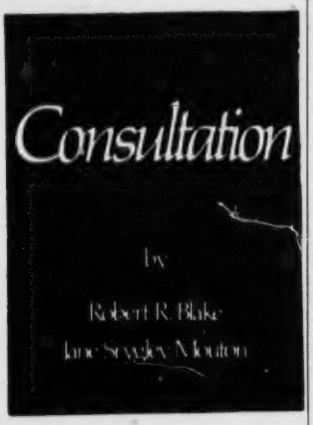
Richard Beckhard
Association Press, 1956 (out of print)

Reviews steps in planning large group meetings; includes suggestions for setting up special interest groups and handling registration and evaluation.

Organizing Macro-Analysis Seminars: A Manual

The Philadelphia Macro-Analysis Collective, 1975, $1.00
4719 Cedar Avenue, Philadelphia, PA 19143

In 83 pages, a plan for carrying out weekly discussion seminars, complete with suggested reading list and agendas, and suggestions for the seminar facilitator. Macro-analysis has to do with the economic, political, social and ecological forces that are shaping the U.S. and the world. The booklet presents a model for organizing seminars which would be helpful regardless of a group's content area.



Consultation

Robert R. Blake and Jane Srygley Mouton
Addison-Wesley, 1976, $17.50

A model for the type of consultation in which a citizen-group trainer might get involved; goes beyond training into long-term organizational development strategies.

TRAINING–ACTIVITY SOURCEBOOKS

The Universal Traveler

Don Koberg and Jim Bagnall
William Kauffman, 1976, $5.45

A guide to problem solving and creative thinking. Provides alternative techniques at each stage of the problem-solving process: accepting the situation, analysis, problem definition, ideation, selection, implementation, and evaluation. Abundant examples, quotations, and references.

Creative Conflict Resolution

Substance Abuse Program,
Federal Correctional Institution
Lexington, Kentucky, 1978

Although developed for a prison-based drug education program, this manual presents workshop activities and procedures which could easily be adapted for citizen group use. Includes value clarification, role plays, listening skill checklists, and conflict resolution procedures. Numerous handouts ready for duplication.

Adult Education Procedures: A Handbook of Tested Patterns for Effective Participation

Paul Bergezin, Dwight Morris, and Robert M. Smith
Seabury Press, 1963, $3.95

A comprehensive collection of adult education techniques.

A Handbook of Faculty Development

Gary H. Quehl, gen. ed., 2 vols.
The Council for the Advancement of Small Colleges, 1977
One Dupont Circle Suite 320, Washington, D.C. 20036

Exercises, Diagnostic instruments, and planning guides designed for the college teacher but will be helpful to anyone planning educational activities. Includes sections on educator motivation, leadership, interpersonal skills, instructional improvement, life planning, values clarification, program development, and evaluation.

Handbook of Structured Experiences for Human Relations Training

Volumes I-VI, and

The Annual Handbook for Group Facilitators

Volumes 1972-present
J.W. Pfeiffer and J.E. Jones, eds.
$12.50 each.
University Associates, La Jolla, Ca

The Annuals and Handbooks contain structured experiences, instruments, lecturettes, papers, book reviews, and other sources for the group facilitator. Useful but expensive.

Tool Catalog — Techniques and Strategies for Successful Action Programs

American Association of University Women, 1976, $6.50
Available from AAUW, 2401 Virginia Avenue, N.W., Washington, D.C. 20037

A catalog of approaches and techniques useful in planning and executing projects. Provides step-by-step processes for carrying out various techniques using low budgets and volunteers.

Sections include: dealing with institutions, fact finding, publicity, information-gathering techniques, organization and planning, and demonstrations of support or opposition.

Techniques for Organizational Effectiveness

American Association of University Women, 1974, $1.95
Available from AAUW (address above)

A manual designed to assist in building a cohesive group and increasing group decision-making skills in community projects. It provides useful "how-to" techniques to create learning situation for improving group process.

The Second Handbook of Organization Development in Schools

Richard A. Schmuck, Philip J. Runkel, Jane H. Arends, and Richard I. Arends
Mayfield Publishing, 1977, $16.95

Practical training plans covering many of the issues which arise when trying to improve the functioning of an organization. Very helpful resource.

Building a Better Board

Ruth Hillis Seay
The W.K. Kellogg Foundation
400 North Avenue, Battle Creek, Michimgan 49016

An informal guide for a community program to improve boards of non-profit, service organizations; includes sample agendas and questionnaires and a case history of a workshop series conducted in Battle Creek.

Experiences in Management and Organizational Behavior

Douglas T. Hall, Donald D. Bowen, Roy J. Lewicki, and Francine S. Hall
St. Clair Press, 1975, $6.95

A book of training exercises, including icebreakers, the assessment of motivation, group decision making and problem solving, intergroup issues and conflict, leadership, power, interpersonal communication, organization building, and planned change.

Organization Behavior in Action: Skill Building Experiences

William C. Morris and Marshall Sashkin
West Publishing Co., 1976, $8.95

Learning activities and background reading cover the areas of problem solving, the helping relationship, information gathering, group process, problem diagnosis, conflict management, and evaluation.

Special attention to the integration of skills through simulation and role-play activities.

An Experiential Approach to Organization Development

Donald F. Harvey and Donald R. Brown
Prentice-Hall, 1976

Consultation and laboratory or workshop learning as tools in the development of an organization. Covers the role of the change agent, strategies for information gathering and diagnosis, motivation for change, and organizational development strategies. Worksheets, questionnaires, simulations, etc.

ORGANIZATIONS

. . . groups that offer training, publications, or other services of use to citizen groups

ACORN

523 West 15th St
Little Rock, Ark. 72202

One of the best known of the organizing/training projects, which started in Arkansas and now has projects and training workshops in many states. Publishes **ACORN News, Community Organizing Handbook** ($3), and other materials; write for details.

Center for Community Change

1000 Wisconsin Ave., N.W.
Washington D.C. 20007

Concerned with national issues affecting the poor and disadvantaged, and federal programs designed to deal with these issues. Provides technical assistance in the areas of housing, manpower, and economic development for urban and rural areas.

Subscription to publications, $10/year., includes the newsletter, Federal Programs MONITOR, and one copy of the Citizen Action Guides as they are published. The Action Guide series includes numbers on block grants monitoring, revenue sharing, CETA, citizen involvement in community development, and citizen involvement in local budgeting. Project reports are also available; write for the current list c/o Director of Publications.

Citizen Involvement Training Project

Division of Continuing Education
University of Massachusetts
Amherst, MA 01003
(413) 549-4970

Citizen Involvement Training Project provides workshops, training materials, and consulting aimed at increasing the effectiveness of citizen groups. CITP began in 1976 under a grant from the W.K. Kellogg Foundation. See back of title page of this manual for a listing of other publications; see page 8 for more information on the project.

Community Action Training

128 West State Street
Trenton, N.J. 08608
(609) 393-3746

A private corporation whose purpose is to assist public agencies in training their employees for maximum performance. Types of training range from organizational development to basic office skills. Have a variety of low cost self-study publications.

Publications include: **How to Conduct a Community Action Meeting**. A fold-out chart and clear guide on procedures for conducting a meeting efficiently and with full participation. $.50

Organizing Groups: A Guide for the Organizer. A book on the various stages a group goes through and the problems it may encounter. Gives suggestions on what the organizer can do. Describes common pitfalls and suggests remedies. $1.50

Citizen Participation: A Casebook for Democracy. A 365-page book which includes 18 monographs and essays on community problem-solving. $2.95

Organizing Credit Unions. This handbook outlines a step-by-step process of how to organize a credit union. $1.50

Tenant Action. A handbook on how to start and carry out a tenant action program. Includes helpful worksheets for the tenant organizer. $1.50

Conway Consulting Collective

Box 181
Conway, MA 01341
(413) 369-4920

Collective offering diverse skills, devoted primarily to keeping alternative and collective organizations "alternative" and "collective." Strength in process skills.

Cooperative Extension Service

County offices throughout the U.S.
State offices at land-grant colleges or universities.

Often, Cooperative Extension Service personnel (such as 4-H workers and Community Resource Developers) take an interest in the effectiveness of the citizen organization in their communities. The CES in some states is developing special programs for citizen group training. CES staff may be able to serve as training resources themselves, or they may be able to refer a group to others who can help.

Institute for the Study of Civic Values

401 No. Broad St., Rm. 810
Philadelphia, PA 19108

Research, networking, and assistance to groups concerned about citizen education and community change. Sponsors the Alliance for Citizen Education, which publishes the **Citizen Education Bulletin.**

League of Women Voters of the United States

1730 M Street, N.W.
Washington, D.C. 20036
(202) 296-1770

Offers a variety of inexpensive publications around various issues ranging from natural resources and urban crises to public relations and money making. Facts and Issues publications present a review of the pros and cons of various issues. A variety of community action guides, chiefly how-to-do-it handbooks, are also available.

Midwest Training Academy

600 W. Fullerton
Chicago, IL 60614

A well-known training center for community organizing. Conducts workshops and internships at their site and at other locations on request. Send for schedule of forthcoming offerings.

Development Press

Desmond Connor, Editor
Box 1016
Oakville, Ontario, CANADA

Publishes **Constructive Citizen Participation**, a quarterly newsletter ($12/yr.; $4/yr. for students and volunteer leaders), **Citizens Participate! An Action Guide for Public Issues** ($2.00), and other print materials; write for current list. Occasional workshops for agency personnel and citizen leaders.

Industrial Areas Foundation

121 E. Grand Avenue
Chicago, IL 60611

Founded in 1940 by Saul Alinsky, IAF has trained many prominent community organizers.

Institute for Responsive Education

704 Commonwealth Avenue
Boston, MA 02215

Publications, assistance, and research directed especially toward citizens working toward better and more responsive schools, but useful to others as well. Write for current literature list.

National Center for Voluntary Action

1785 Massachusetts Ave., N.W.
Washington, D.C. 20036
(202) 467-5560

Serves as a principal national source of information on successful programs involving volunteers; assists in the development of volunteer service centers in communities around the nation. Services include consultation and the collection, analysis, and distribution of information on various aspects of volunteering. Extensive publication program; write for list. NCVA's Technical Services Division and consultant network are described in two brochures, **NCVA Technical Services** and **Help Is On the Way**, both free.

National Citizen Participation Council

1620 Eye Street, N.W. Suite 517
Washington, D.C. 20006
(202) 293-7351

A nonprofit organization dedicated to promoting citizen participation and involvement in the development of federal policy for urban and community programs.

Operates 10 regional centers which geographically parallel the Department of Housing and Urban Development regions. Services include: technical assistance and training to regional and local citizen participation groups, including information on specific federally funded programs and assistance in analyzing and interpreting federal regulations and legislations; maintains a library and citizen information and referral service.

National Information Center on Volunteerism

P.O. Box 4179
Boulder, Colorado 80302
(303) 447-0492

An organization concerned with maximizing the effectiveness of, and involving more people in, volunteer programs and citizen involvement efforts. Provides technical assistance, information services, consultation, leadership training, and program evaluation.

NICOV has publications on the development, maintenance, and evaluation of volunteer programs, including some good books on running meetings and community change work. Send for their publications brochure.

A newsletter, **Voluntary Action Leadership** is published quarterly in conjunction with the National Center for Voluntary Action; $8/year.

voluntary action
leadership

The National Self-Help Resource Center

2000 S Street, N.W.
Washington, D.C. 20009
(202) 338-5704

The National Self-Help Resource Center is seeking to build linkages between local self-help initiatives willing to aid in the development of a cooperative exchange of information and resources. Serves a national network of community resource centers and related organizations through the National CRC (Community Resource Center) with information resources, publications, technical assistance, consultation and training.

Newsletter: **Exchange**, quarterly; **Network Notes**, monthly, to membership.

Membership: Active CRC's $20; Associate members, locally-based neighborhood organizations or special-interest resource centers, $15; individuals $10; governmental agencies, professional, civic, or human service organizations, $35.

National Training and Development Service

5028 Wisconsin Avenue, N.W.
Washington, D.C. 20016
(202) 966-3761

Provides training sessions and materials focused on the needs of state and local government personnel. The Urban Management curriculum series, for example, covers urban planning, evaluation, quantitative methods, program analysis, labor relations, and public service distribution. Publications list available.

National Training and Information Center

121 W. Superior Street
Chicago, Illinois 60610
(312) 751-1601

Provides technical assistance, training, information, and consultation to community groups who are organizing to determine the future of their communities. Stress on housing and other neighborhood-level survival issues. Publication list available.

New England Cooperative Training Institute (NECTI)

16 Crown St., Rm. 403
New Haven, CT 06510
(203) 776-0451

Training collective focusing on financial development and management for consumer cooperatives; considerable experience working with food coops.

New England Training Center for Community Organizers (NETCCO)

19 Davis St.
Providence, RI 02908

Provides training workshops for community organizers at their site and throughout the Northeast. Videotape library of community organizing case studies.

The Urban Institute

2100 M Street N.W.
Washington, D.C. 20037

An independent, nonpartisan, nonprofit research organization. Its free **Publications Catalog** lists the Institute's research reports and interpretive essays in such areas as policy analysis, program evaluation, transportation, health, land use, housing, urban public finance, criminal justice, and urban economic development. Some of these publication are listed in resource section of CITP's manual, **How to Make Citizen Involvement Work**, p. 92.

Urban Planning Aid, Inc.

Room 305
2 Park Square
Boston, MA 02116
(617) 482-6695

Provides technical assistance and resource materials to low income groups seeking to improve their working and living conditions. Aim is to provide back-up support. Focus is on health and safety, media use, research (social, political, and economic questions) and housing.

PROFESSIONAL JOURNALS AND ASSOCIATIONS

Adult Education Association of the U.S.A.

810 18th St., N.W.
Washington, D.C. 20006

Professional association of adult educators. Publishes **Lifelong Learning: The Adult Years** and **Adult Leadership**, $18/yr. each, or included in $35 AEA membership.

Adult Education (London)

National Institute of Adult Education
198 DeMontfort St.
Leicester, LE1 7GE, ENGLAND

Reports on research in adult education plus case studies of demonstration projects, some of them community based. Six issues/yr., £3.75; available at major libraries.

American Society for Training and Development (ASTD)

P.O. Box 5307
Madison, WI 53705
(608) 274-3440

Professional society of corporate training personnel, primarily. Annual convention; publishes **Training and Development Journal** ($30/yr., monthly). A look at this magazine will give an impression of the scope and influence of training in modern business and management.

Community Development Society

305 Mumford Hall
University of Illinois
Urbana, IL 61801

Professional society of community development workers. Publishes **Journal of the Community Development Society**, spring and fall, included with membership fee of $15/yr.

Community Education Journal

Pendell Publishing Company
Midland, MI 48640

The professional journal in the field of community education. Publishes research findings, case studies, news in the field, and training opportunities. Bimonthly.

Convergence: An International Journal of Adult Education

International Council for Adult Education
29 Prince Arthur Avenue
Toronto, Ontario M5R 1B2,
CANADA

Trilingual but primarily English journal of adult and community education. Theoretical and practical papers on the structuring and implementation of national and local programs; commentary on nonformal education, consciousness raising, and other issues which may be of interest to the citizen group trainer. $12/yr., $30/3 yrs.

Journal of Applied Behavioral Science

Institute for Applied
Behavioral Science
National Training Lab (NTL)
1501 Wilson Boulevard,
Suite 1000
Arlington, VA 22209

A journal of human relations and intragroup communication, community and organizational development. Mix of theoretical and practical approaches. $19/yr. NTL offers a wide range of training activities, some of them directed to community organizers and citizen activists.

National Association for Community Development

1029 Vermont Avenue, N.W.
Washington, D.C. 20005

Publishes **Community Development**, quarterly.

National Community Education Association

1017 Avon St.
Flint, MI 48503
(313) 234-1634

The primary institution for the development of community education at the national level. It has regional centers, and is the key mechanism for citizen input into federal community education policy. Annual national convention; publishes **Community Education Today**, Community Education **News**, and **Research Bulletin** (all bimonthly). $15 membership fee.

National University Extension Association—Community Development Division

1 Dupont Circle
Washington, D.C. 20036

A professional association of community development specialists, primarily those at universities and colleges. Conducts workshops at the annual NUEA conference.

SOURCES OF PRINT, A-V, AND GAMING MATERIALS

ERIC (Educational Resources Information Center)

ERIC is a retrieval system for information in education. It includes two indexes—**Current Index to Journals in Education**, the educator's counterpart to the **Reader's Guide to Periodical Literature**, and **Resources in Education**. The latter is an index to the extensive ERIC collection of microfiche documents, available at major libraries, which includes research reports, case studies, and other documents, many of them otherwise unavailable. Computer-assisted search of the collection for topics of interest is available.

Film Catalogs

School and university audiovisual departments and public libraries are potential sources of commercial film rental catalogs. Public library users often have access to film collections housed at regional library centers. See CITP's **Power: A Repossession Manual**, page 117, for additional sources of films that may be of use in citizen training programs.

Gaming Service

The University of Michigan
412 Maynard Street
Ann Arbor, MI 48104
(313) 763-1013

Developers of simulation games, many of which are valuable training tools for citizen groups. Topics include land use, pollution, police-community relations, etc. Some are board games, some are computer-assisted simulations, and some require no special materials or experience. Write for catalog.

The Guide to Simulations/Games for Education and Training

David W. Zuckerman and
Robert E. Horn
Didactic Systems; 3rd ed., 1976

The definitive directory of games and simulations. Includes "A Basic Reference Shelf on Simulation and Gaming" by Paul A. Twelker and Katherine Layden.

University Associates

7596 Eads Avenue
LaJolla, CA 92037

Publishers of materials in education, training, organizational development, and community development. Catalog available. Also conduct workshops at various locations across the country on the same range of topics.

SERIES INDEX

This is a cumulative index of the eight training manuals published by the Citizen Involvement Training Project. All exercises are printed in capital letters, to make it possible to scan the index for them. The following letter code is used to identify the different manuals:

BE = Beyond Experts: A Guide for Citizen Group Training
MIW = How to Make Citizen Involvement Work
PFC = Planning, for a Change
PRM = Power: A Repossession Manual
PTG = Playing Their Game Our Way: Using the Political Process to Meet Community Needs
RGR = The Rich Get Richer and the Poor Write Proposals
WIP = We Interrupt This Program . . . A Citizen's Guide to Using the Media for Social Change
WT = Working Together: A Manual for Helping Groups Work More Effectively

These code letters **follow** the page numbers; if you find no code letters after a page number, read on: they will be after the **last** item in a string of topics which come from the same manual. Ordering information for the other manuals is found on the back of the title page.

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BE = Beyond Experts: A Guide for Citizen Group Training
MIW = How to Make Citizen Involvement Work
PFC = Planning, for a Change
PRM = Power: A Repossession Manual
PTG = Playing Their Game Our Way: Using the Political Process to Meet Community Needs
RGR = The Rich Get Richer and the Poor Write Proposals
WIP = We Interrupt This Program . . . A Citizen's Guide to Using the Media for Social Change
WT = Working Together: A Manual for Helping Groups Work More Effectively

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- exercises and worksheets which clarify the steps involved in planning and leading training activities
- suggestions for the continuing development of the trainer
- an annotated bibliography and directory of resource groups
- a cumulative index to all eight of the training manuals published by the Citizen Involvement Training Project.

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ISBN 0-934210-07-1